CHAPTER 5: PRINTING AND REPORTS

I. REPORTS AND FORMS

II. PRINT LIST PANE

III. QUICK REPORT

IV. FULL VIEW

Table of Reports and Forms Listed by Report

Report Name	Module	Description
10-95 Accession Receiving Report	Accessions	
10-95c Accession Receiving Report Continuation	Accessions	
10-96 Folder List.doc	Archives-any level	Word Document
10-97 Temporary Removal Slip	Catalog Records	
10-98 Incoming Loan Agreement	Loans In	
10-98 Blank Incoming Loan Agreement.doc	Loans In	Word Document, blank form
10-98a Conditions for Incoming Loans.doc	Loans In	Word Document
10-98b Incoming Loan Extension	Loans In	
10-98b Incoming Loan Extension – Blank.doc	Loans In	Word Document, blank form
10-98c Incoming Loan Agreement Continuation	Loans In	
10-99 Conveyance Agreement	Deaccessions	
10-127 Outgoing Loan Agreement	Loans Out	
10-127 Blank Outgoing Loan Agreement.doc	Loans Out	Word Document, blank form
10-127a Conditions for Outgoing Loans.doc	Loans Out	Word Document
10-127c Outgoing Loan Agreement Continuation	Loans Out	
10-254 CR Museum Catalog Record	Catalog Records	For CR only
10-254b NH Museum Catalog Record	Catalog Records	For NH only
10-255 Accession Folder Cover Sheet.doc	Accessions	Word Document
10-417 List of Objects	Catalog Records	
10-417 List of Objects.doc	Catalog Records	Word Document, blank form
10-500 Vertebrate Wet Specimen Label	Catalog Records	For NH only
10-501 Vertebrate Specimen	Catalog Records	For NH only
10-501c Vertebrate Specimen-columns	Catalog Records	For NH only, prints multiple columns.
10-502 Skull vial-box label	Catalog Records	For NH only
10-502c Skull vial-box Label-columns	Catalog Records	For NH only, prints multiple columns.
10-503 Invertebrate Specimen Label	Catalog Records	For NH only
10-504 Geology Collection Label	Catalog Records	For NH only
10-504c Geology Collection Label-columns	Catalog Records	For NH only, prints multiple columns
10-505 Paleontology Label	Catalog Records	For NH only
10-505b Paleontology Label-small	Catalog Records	For NH only
10-505c Paleontology Label-columns	Catalog Records	For NH only, prints multiple columns.
10-506 Wet Plant Specimen Label	Catalog Records	For NH only
10-507 Invertebrate Label	Catalog Records	For NH only
10-507c Invertebrate Label-columns	Catalog Records	For NH only, prints multiple columns.
10-508 Egg Box Label	Catalog Records	For NH only
10-509 Insect Label	Catalog Records	For NH only
10-509 Insect Label-Extra Small	Catalog Records	For NH only
10-509c Insect Label-columns	Catalog Records	For NH only, prints multiple columns.
10-509c Insect Label-columns-Extra Small	Catalog Records	For NH only, prints multiple columns.
10-510 Annotation Label	Catalog Records	For NH only
10-511 Mineral Collection Label	Catalog Records	For NH only
10-512 Herbarium Label	Catalog Records	For NH only
10-637 Object Condition Report	Catalog Records	

Report Name	Module	Description
10-640 Outgoing Loan Folder Cover Sheet	Loans Out	
10-640 Outgoing Loan Folder Cover Sheet – Blank.doc	Loans Out	Word Document, blank form
10-641 Outgoing Loan Extension	Loans Out	
10-641 Outgoing Loan Extension – Blank.doc	Loans Out	Word Document, blank form
10-643 Deaccession Form	Deaccessions	
10-644 Deaccession Folder Cover Sheet.doc	Deaccessions	Word Document
10-645 Separation Sheet.doc	Archives-any level	Word Document
10-830 Deed of Gift	Accessions	
10-830 Deed of Gift – Blank.doc	Accessions	Word Document, blank form
10-830c Deed of Gift Continuation	Accessions	
ACCCAT	Accessions	Prints the accession source and count with a list of objects from the accession.
Accession List	Catalog Records	Create a tag set or group records by accession. Prints accession information with a list of the objects.
Accession Worksheet.doc	Accessions	Word Document
All Fields	Accessions	Prints all fields that contain data
All Fields	Archives-any level	Prints all fields that contain data
All Fields	Catalog Records	Prints all fields with data.
Archeology Label	Catalog Records	For CR only
Archeology Worksheet.doc	Catalog Records	For CR only, Word Document
Archives Worksheet.doc	Archives-Collection level	Word Document
Archives Worksheet-Cultural Resources.doc	Catalog Records	For CR only, Word Document
Biology Worksheet.doc	Catalog Records	For NH only, Word Document
Catalog Number Log	Catalog Records	
CMR Accession Verification	Accessions	
CMR Catalog Count for Tag	Catalog Records	Provides CMR counts for records in a tag set
CMR Catalog Count for Year	Catalog Records	Provides CMR counts for all records by Year
CMR Deaccession Verification	Catalog Records	Provides CMR counts for deaccessioned records
Collection Totals	Archives-Collection level	Totals all the item counts in the extent field for the visible records.
Container List.doc	Archives-any level	Word Document
Copyright Notice	Archives-Collection level	
Copyright Notice	Names and Addresses	
Daily Tasks	Maintenance	
DI-104 Transfer of Property	Deaccessions	
DI-104 Transfer of Property Blank Form.doc	Deaccessions	Word Document
DI-105 Receipt for Property	Accessions	This is a blank form
DI-105 Receipt for Property	Catalog Records	Prints catalog records in a tag set or filter
Duplication Form	Names and Addresses	
Ethnology Worksheet.doc	Catalog Records	For CR only, Word Document
Exchange Agreement.doc	Deaccessions	Word Document
Exhibit List	Exhibits	
File Unit Totals	Archives-File Unit level	Totals all the item counts in the extent field for the visible records.
Foldlist	Archives-Item Level	Folder list
Geology Worksheet.doc	Catalog Records	For NH only Word Document
History Worksheet.doc	Catalog Records	For CR only, Word Document
Incoming Loan List	Loans In	

Report Name	Module	Description
Item Level Archives Worksheet.doc	Archives-Item Level	Word Document
Item Totals	Archives-Item Level	Totals all the item counts in the extent field for the visible records.
Location Schedule	Maintenance	
Missing Required Data for Accessions	Accessions	Run on all accession records to report which accessions have missing required data.
Missing Required Data for Cultural Records	Catalog Records	For CR only, Lists records in the CR directory that do not have all the required fields completed.
Missing Required Data for Cultural Records-Draft Only	Catalog Records	For CR only, Lists records in the CR directory that are Draft Records and the required fields that are missing.
Missing Required Data for Natural History Records	Catalog Records	For NH only, lists records in the NH directory that do not have all the required fields completed.
Missing Required Data for Natural History Records-Draft Only	Catalog Records	For NH only, lists records in the NH directory that are Draft Records and the required fields that are missing.
Nag-ca	Catalog Records	CR only. NAGPRA suppl. report
Nag-ca2	Catalog Records	CR only. NAGPRA suppl. report
Nag-cui	Catalog Records	CR only. NAGPRA suppl. report
NAGPRA Inventory Report	NAGPRA	Use the NAGPRA Inventory Report button just below the button bar.
NAGPRA Items Report	NAGPRA	Use the NAGPRA Items Report button just below the button bar.
Object Caption List	Catalog Records	For CR only
Object Caption Report	Catalog Records	For CR only
Outgoing Loan List	Loans Out	
Paleontology Worksheet.doc	Catalog Records	For NH only, Word Document
Quarterly Tasks	Maintenance	
Repatriation Agreement.doc	Deaccessions	Word Document
Researcher Registration Form	Names and Addresses	
Series Totals	Archives-Series level	Totals all the item counts in the extent field for the visible records.
Source of Accession	Accessions	
Specialist Review Form	Deaccessions	
Specimen Caption List	Catalog Records	For NH only
Specimen Caption Report	Catalog Records	For NH only
Survey Form	Archives-Collection level	
Tasks	Maintenance	
Tasksstr	Maintenance	Same as Tasks, allows fields to stretch
Unique Accession Numbers	Catalog Records	Lists all accession numbers represented in the data.
Unique Locations	Catalog Records	Lists all locations represented in the data.
Unique Names	Catalog Records	Lists all object or scientific names represented in the data.
Unique Storage Unit Entries	Catalog Records	Lists all storage units represented.
Value	Catalog Records	Prints appraisal information.
Visitor Log.doc	Names and Addresses	Word Document
Visitor Log Conditions.doc	Names and Addresses	Word Document
Weekly Tasks	Maintenance	

Automated Checklist Program Reports (ACP)

Report Name	Module	Description
Blank Checklist	ACP Checklist	This will print out a blank form for the ACP. You must enter a facility record and type.
Checklist by Facility	ACP Checklist	Run on single facility. Basic checklist form for current facility.
Checklist by Question	ACP Checklist	Checklist for All Facilities by Question. Run on multiple facilities.
Checklist for Deficiencies	ACP Checklist	Run on single facility. Shows only questions with 'No' answers.
Checklist with History	ACP Checklist	Run on single facility. Includes history of past responses to questions
Cover	ACP Cover Sheet	ACP coversheet
Deficiency Report	ACP Checklist	Run on multiple facilities
Estfund	ACP Checklist	Estimate of total funding needed by facility. Run on multiple facilities.
Estfund2	ACP Checklist	Estimate of total funding needed. Run on single facility.
Estfund3	ACP Checklist	Estimate of total funding needed for all facilities combined. Run on multiple facilities
Facility	ACP Facilities	Facility coversheet
Facilitylist	ACP Facilities	List of facilities
Supercover	ACP Checklist	Superintendent's coversheet
Superintendent Summary	ACP Checklist	Summary review for superintendent
Unanswered Questions	ACP Checklist	Prints a list of questions in the ACP that have not been answered.

Automated Inventory Program Reports (AIP)

Report Name	Module	Description
10-349 Inventory – Accessions	AIP Accessions	Accession inventory list
10-349 Inventory – Accessions – Blank.doc	AIP Accessions	Word Document, blank form
10-349 Inventory – Controlled Property	AIP Controlled Property	Controlled Property inventory list
10-349 Inventory – Controlled Property – Blank.doc	AIP Controlled Property	Word Document, blank form
10-349 Inventory – Random Sample	AIP Random Sample	Random Sample inventory list
10-349 Inventory – Random Sample – Blank.doc	AIP Random Sample	Word Document, blank form
Summary (AIP Accessions)	AIP Accessions	AIP Summary sheet for accessions
Summary (AIP Controlled Property)	AIP Controlled Property	AIP Summary sheet for Controlled Property
Summary (AIP Random Sample)	AIP Random Sample	AIP Summary sheet for Random Sample

Collections Management Report (CMR)

Report Name	Module	Description
CMR	Collections Management Report	
CMR for Centers	Collections Management Report	Used by Centers
CMRwork	Collections Management Report	Worksheet for the CMR

Table of Reports and Forms Listed by Module

Module	Report Name	Description
Accessions	10-95 Accession Receiving Report	
Accessions	10-95c Accession Receiving Report Continuation	
Accessions	10-255 Accession Folder Cover Sheet.doc	Word Document
Accessions	10-830 Deed of Gift	
Accessions	10-830 Deed of Gift – Blank.doc	Word Document, blank form
Accessions	10-830c Deed of Gift Continuation	
Accessions	ACCCAT	Prints the accession source and count with a list of objects from the accession.
Accessions	Accession Worksheet.doc	Word Document
Accessions	All Fields	Prints all fields that contain data
Accessions	CMR Accession Verification	
Accessions	DI-105 Receipt for Property	This is a blank form
Accessions	Missing Required Data for Accessions	Run on all accession records to report which accessions have missing required data.
Accessions	Source of Accession	
Archives-any level	10-96 Folder List.doc	Word Document
Archives-any level	10-645 Separation Sheet.doc	Word Document
Archives-any level	All Fields	Prints all fields that contain data
Archives-any level	Container List.doc	Word Document
Archives-Collection level	Archives Worksheet.doc	Word Document
Archives-Collection level	Collection Totals	Totals all the item counts in the extent field for the visible records.
Archives-Collection level	Copyright Notice	
Archives-Collection level	Survey Form	
Archives-Series level	Series Totals	Totals all the item counts in the extent field for the visible records.
Archives-File Unit level	File Unit Totals	Totals all the item counts in the extent field for the visible records.
Archives-Item level	Foldlist	Folder list
Archives-Item level	Item Level Archives Worksheet.doc	Word Document
Archives-Item level	Item Totals	Totals all the item counts in the extent field for the visible records.
Catalog Records	10-254 CR Museum Catalog Record	For CR only
Catalog Records	10-254b NH Museum Catalog Record	For NH only
Catalog Records	10-417 List of Objects	
Catalog Records	10-417 List of Objects.doc	Word Document, blank form
Catalog Records	10-500 Vertebrate Wet Specimen Label	For NH only
Catalog Records	10-501 Vertebrate Specimen	For NH only
Catalog Records	10-501c Vertebrate Specimen-columns	For NH only, prints in multiple columns.
Catalog Records	10-502 Skull vial-box label	For NH only
Catalog Records	10-502c Skull vial-box Label-columns	For NH only, prints in multiple columns.
Catalog Records	10-503 Invertebrate Specimen Label	For NH only
Catalog Records	10-504 Geology Collection Label	For NH only
Catalog Records	10-504c Geology Collection Label-columns	For NH only, prints in multiple columns.
Catalog Records	10-505 Paleontology Label	For NH only
Catalog Records	10-505b Paleontology Label-small	For NH only
Catalog Records	10-505c Paleontology Label-columns	For NH only, prints in multiple columns.
Catalog Records	10-506 Wet Plant Specimen Label	For NH only
Catalog Records	10-507 Invertebrate Label	For NH only
Catalog Records	10-507c Invertebrate Label-columns	For NH only, prints in multiple columns.

Module	Report Name	Description
Catalog Records	10-508 Egg Box Label	For NH only
Catalog Records	10-509 Insect Label	For NH only
Catalog Records	10-509 Insect Label-Extra Small	For NH only
Catalog Records	10-509c Insect Label-columns	For NH only, prints in multiple columns.
Catalog Records	10-509c Insect Label-columns-Extra Small	For NH only, prints in multiple columns.
Catalog Records	10-510 Annotation Label	For NH only
Catalog Records	10-511 Mineral Collection Label	For NH only
Catalog Records	10-512 Herbarium Label	For NH only
Catalog Records	10-637 Object Condition Report	
Catalog Records	10-97 Temporary Removal Slip	
Catalog Records	Accession List	Create a tag set or group records by accession. Prints accession information with a list of the objects.
Catalog Records	All Fields	Prints all fields with data.
Catalog Records	Archeology Label	For CR only
Catalog Records	Archeology Worksheet.doc	For CR only, Word Document
Catalog Records	Archives Worksheet-Cultural Resources.doc	For CR only, Word Document
Catalog Records	Biology Worksheet.doc	For NH only, Word Document
Catalog Records	Catalog Number Log	
Catalog Records	CMR Catalog Count for Tag	Provides CMR counts for records in a tag set
Catalog Records	CMR Catalog Count for Year	Provides CMR counts for all records by Year
Catalog Records	CMR Deaccession Verification	Provides CMR counts for deaccessioned records
Catalog Records	DI-105 Receipt for Property	Prints catalog records in a tag set or filter
Catalog Records	Ethnology Worksheet.doc	For CR only, Word Document
Catalog Records	Geology Worksheet.doc	For NH only Word Document
Catalog Records	History Worksheet.doc	For CR only, Word Document
Catalog Records	Missing Required Data for Cultural Records	For CR only, Lists records in the CR directory that do not have all the required fields completed.
Catalog Records	Missing Required Data for Cultural Records-Draft Only	For CR only, Lists records in the CR directory that are Draft Records and the required fields that are missing.
Catalog Records	Missing Required Data for Natural History Records	For NH only, lists records in the NH directory that do not have all the required fields completed.
Catalog Records	Missing Required Data for Natural History Records-Draft Only	For NH only, lists records in the NH directory that are Draft Records and the required fields that are missing.
Catalog Records	Nag-ca	CR only. NAGPRA suppl. report
Catalog Records	Nag-ca2	CR only. NAGPRA suppl. report
Catalog Records	Nag-cui	CR only. NAGPRA suppl. report
Catalog Records	Object Caption List	For CR only
Catalog Records	Object Caption Report	For CR only
Catalog Records	Paleontology Worksheet.doc	For NH only, Word Document
Catalog Records	Specimen Caption List	For NH only
Catalog Records	Specimen Caption Report	For NH only
Catalog Records	Unique Accession Numbers	Lists all accession numbers represented in the data.
Catalog Records	Unique Locations	Lists all locations represented in the data.
Catalog Records	Unique Names	Lists all object or scientific names represented in the data.
Catalog Records	Unique Storage Unit Entries	Lists all storage units represented in the data.
Catalog Records	Value	Prints appraisal information.

Module	Report Name	Description
Deaccessions	10-643 Deaccession Form	
Deaccessions	10-644 Deaccession Folder Cover Sheet.doc	Word Document
Deaccessions	10-99 Conveyance Agreement	
Deaccessions	DI-104 Transfer of Property	
Deaccessions	DI-104 Transfer of Property Blank Form.doc	Word Document
Deaccessions	Exchange Agreement.doc	Word Document
Deaccessions	Repatriation Agreement.doc	Word Document
Deaccessions	Specialist Review Form	
Exhibits	Exhibit List	
Loans In	10-98 Incoming Loan Agreement	
Loans In	10-98 Blank Incoming Loan Agreement.doc	Word Document, blank form
Loans In	10-98a Conditions for Incoming Loans.doc	Word Document
Loans In	10-98b Incoming Loan Extension	
Loans In	10-98b Incoming Loan Extension – Blank.doc	Word Document, blank form
Loans In	10-98c Incoming Loan Agreement Continuation	
Loans In	Incoming Loan List	
Loans Out	10-127 Outgoing Loan Agreement	
Loans Out	10-127 Blank Outgoing Loan Agreement.doc	Word Document, blank form
Loans Out	10-127a Conditions for Outgoing Loans.doc	Word Document
Loans Out	10-127c Outgoing Loan Agreement Continuation	
Loans Out	10-640 Outgoing Loan Folder Cover Sheet	
Loans Out	10-640 Outgoing Loan Folder Cover Sheet – Blank.doc	Word Document, blank form
Loans Out	10-641 Outgoing Loan Extension	
Loans Out	10-641 Outgoing Loan Extension – Blank.doc	Word Document, blank form
Loans Out	Outgoing Loan List	
Maintenance	Daily Tasks	
Maintenance	Location Schedule	
Maintenance	Quarterly Tasks	
Maintenance	Tasks	
Maintenance	Tasksstr	Same as Tasks, allows fields to stretch
Maintenance	Weekly Tasks	
NAGPRA	NAGPRA Inventory Report	Use button below button bar
NAGPRA	NAGPRA Items Report	Use button below button bar
Names and Addresses	Copyright Notice	
Names and Addresses	Duplication Form	
Names and Addresses	Researcher Registration Form	
Names and Addresses	Visitor Log.doc	Word Document
Names and Addresses	Visitor Log Conditions.doc	Word Document

Automated Checklist Program Reports (ACP)

Module	Report Name	Description
ACP Cover Sheet	Cover	ACP Coversheet
ACP Facilities	Facility	Facility coversheet
ACP Facilities	Facilitylist	List of Facilities
ACP Checklist	Blank Checklist	This will print out a blank form for the ACP. You must enter a facility record and type.
ACP Checklist	Checklist by Facility	Run on single facility. Basic checklist form for current facility.
ACP Checklist	Checklist by Question	Checklist for All Facilities by Question. Run on multiple facilities.
ACP Checklist	Checklist for Deficiencies	Run on single facility. Shows only questions with 'No' answers.
ACP Checklist	Checklist with History	Run on single facility. Includes history of past responses to questions
ACP Checklist	Deficiency Report	Run on multiple facilities
ACP Checklist	Estfund	Estimate of total funding needed by facility. Run on multiple facilities.
ACP Checklist	Estfund2	Estimate of total funding needed. Run on single facility.
ACP Checklist	Estfund3	Estimate of total funding needed for all facilities combined. Run on multiple facilities
ACP Checklist	Supercover	Superintendent's coversheet
ACP Checklist	Superintendent Summary	Summary review for superintendent
ACP Checklist	Unanswered Questions	Prints a list of questions in the ACP that have not been answered.

Automated Inventory Program Reports (AIP)

Module	Report Name	Description
AIP Accessions	10-349 Inventory – Accessions	Accession inventory list
AIP Accessions	10-349 Inventory – Accessions – blank.doc	Word document, blank form.
AIP Accessions	Summary (AIP Accessions)	AIP Summary sheet for accessions
AIP Controlled Property	10-349 Inventory – Controlled Property	Controlled Property inventory list
AIP Controlled Property	10-349 Inventory – Controlled Property – blank.doc	Word document, blank form.
AIP Controlled Property	Summary (AIP Controlled Property)	AIP Summary sheet for Controlled Property
AIP Random Sample	10-349 Inventory – Random Sample	Random Sample inventory list
AIP Random Sample	10-349 Inventory – Random Sample – blank.doc	Word document, blank form.
AIP Random Sample	Summary (AIP Random Sample)	AIP Summary sheet for Random Sample

Collections Management Report (CMR)

Module	Report Name	Description
Collections Management Report	CMR	
Collections Management Report	CMR for Centers	Use by Centers
Collections Management Report	CMRwork	Worksheet for the CMR

I. REPORTS AND FORMS

A. Overview

1. *Does **ANCS+** include NPS forms?*

Yes. **ANCS+** includes all the mandatory NPS forms and many other optional forms and reports. NPS form numbers begin with 10, such as 10-254. Department of Interior forms begin with DI, such as DI-105. Other forms in the program appear by name.

Many of the forms are mapped. This means that the program will complete the forms from the data you enter in the fields in the program.

2. *How will I know which forms or reports are mapped?*

This chapter includes a list of the forms that are mapped. The manual and on-line field help will also tell you which fields are mapped to the forms.

3. *Where are the forms located?*

Forms are located in the Cultural Resources and Natural History collection records, most of the associated modules, the ACP, AIP, CMR and the Archives Module. You must go to the appropriate module in the program to access reports and forms for that module. For example, you must go to the Loans Out associated module to access the outgoing loan agreement.

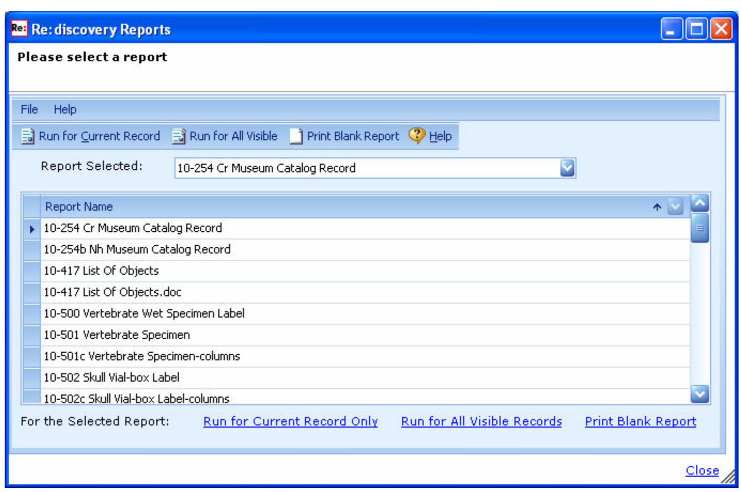
Note: See Appendix F: Archives Module, for information on the reports in this module

4. *How do I access the forms?*

To access the forms:

- Go to the appropriate module and choose the records you want in the report or form. Activate a filter, tag set or highlight records in the list pane to print a form that includes data from a group of records, such as a receipt for property. Refer to Chapter 7 for information on activating filters, and tag sets.
- Click on the Re:discovery Reports icon on the button bar, or go to Record on the menu bar and choose Reports → Re:discovery Reports.

A list of reports and forms appears in a separate window. Forms with a .doc extension print from your word processing system.

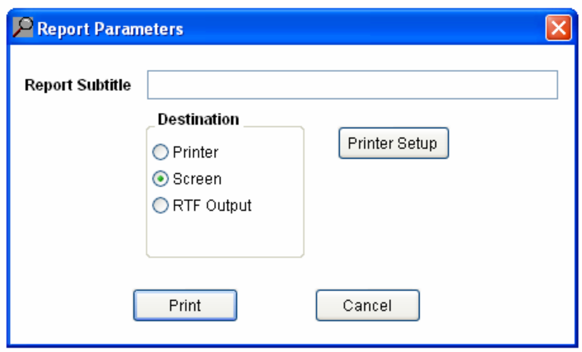


Forms with a .doc extension are Word documents. When printing, they will open in a Microsoft Word window. Print them as you would any other Word document. You can complete these forms on the computer or manually. If you complete the forms on the computer, save them under another name. You can then maintain a clean copy of the forms for future use. Save these forms in Word to preserve the formatting.

5. *How do I print a form?*

To print a form or report:

- Go to the list of reports and forms in the appropriate module.
- Choose a report on the list by clicking on it.
- Click Run for Current Record only, to print the form for the record currently on the screen. Click Run for All Visible Records when you have a filter or tag set activated or records highlighted in the list pane. Click Print Blank Report to print a blank form to complete manually.
- The Report Parameters window appears allowing you to enter a report subtitle. Don't use a subtitle with NPS forms and most other reports. A few of the maintenance schedules use subtitles. Refer to Section VI of Chapter 4 for information on completing the maintenance schedules.



- Choose between Printer, Screen or RTF Output. It's always a good idea to view the form or report on the screen before printing it.
- Click the Print button to send the form to the screen, printer, or file. When printing forms, follow the Windows print commands that appear in the print dialog box.

6. *Can I save a report electronically?*

Yes. To print a report to a file that can be sent through email, follow these steps:

- Select the report and click Run for Current Record or Run for All Visible Records.
- In the Print Parameters window, select the RTF Output option. RTF (Rich Text Format) files can be opened in Word and work best for reports with graphic elements such as lines.
- When you select this option, you will be warned that you must have Word ('97 or higher) installed to use this function. Click OK, then click Print.

- In the Save As window that appears, select the location and enter a name for the file. Note the location and file name so you can find it later.

7. *Why would I want to print a blank form if **ANCS+** will complete the forms for me?*

You may want to print a blank form for a worksheet, or you may prefer to complete the forms manually.

8. *Can I change the forms and reports in **ANCS+**?*

No. You cannot change the reports and forms that are included in **ANCS+**. You can make modifications to the Word forms that print from your word processing system. For example, you may want to add wording to the exchange agreement to include conditions specific to the exchange. However, you should save modified forms under another name to maintain a clean copy of the original form for future use.

9. *Can I add forms and reports to **ANCS+**?*

Yes. You can add park-specific reports and forms to **ANCS+**, but you cannot use these forms in place of the standard NPS forms. For example, you cannot add an outgoing loan agreement to use in place of the Outgoing Loan Agreement (Form 10-127).

You can purchase customization services from Re:discovery Software, Inc. to have them create park-specific reports and forms. Refer to Appendix K: Support, for information on purchasing customization services.

10. *Must I print forms on special paper?*

Use acid-free paper for printing accession, loan, deaccession, and catalog forms. You don't need to use acid-free paper for printing reports and forms such as maintenance schedules and CMR verification reports.

11. *Will new NPS forms and reports be added to **ANCS+**?*

Yes. Any new official forms will be added to the program as needed. Future updates of the program may include forms that parks or centers have developed, if the forms are of use on a service-wide basis.

B. NPS Unit

1. *What is the NPS Unit?*

The NPS Unit is a name and address record for the park that maps to many of the NPS forms in the program. When you install and setup **ANCS+**, you should enter a NPS Unit record. Once you enter the record in the program, you can modify it as changes occur at the park.

2. *How do I enter the NPS Unit record?*

To enter the NPS Unit record, go to the Names and Addresses associated module. Refer to Section XII of Chapter 4 for how to use this module. Complete the fields in the record as follows:

Name ID – enter the words: NPS UNIT (in all caps). ***Don't enter the name of the park.***

First - enter the first name of the superintendent

Last - enter the last name of the superintendent

Title - enter Superintendent

Div/Unit - enter the name of the park

Address 1 - enter the first line of the park's address

Address 2 - enter the second line of the park's address

City/St/Zip - enter the city, state, and zip code for the park

Alternate Address - complete these fields if the park's shipping address is different from the mailing address

Phone - enter the park's phone number

Fax - enter the park's fax number

NPS - enter NPS

C. Collection Record Forms and Reports

1. Where do I go to print collection record forms and reports?

Go to the Collections Records Module, either Cultural Resources or Natural History, to print collection record forms and reports. This section contains a list of the forms and reports available in the Collection Records Module. It also includes a list of the fields that map to the forms. Mandatory forms are marked with an asterisk (*).

You will see the same list of forms and reports in both the Cultural Resources and Natural History directories. You must run separate reports for CR and NH records. You cannot combine the reports to include data from both directories.

2. What forms and reports are available from the Collection Records Module?

***10-254 and 10-254B Museum Catalog Record**

Use the 10-254 with Cultural Resources records. Use the 10-254B with Natural History records.

You don't have to print the Form 10-254. The National Catalog will print archival copies of these forms from your electronic submission. The National Catalog will also print blue working copies for the park if you request them.

The fields map from the corresponding fields on the catalog record screen with the following exceptions:

10-254 Field	***Maps From***
Acquisition Type	Acquisition Type in the Accession Records associated module
Acquisition Date	Acquisition Date in the Accession Records associated module
Photo Number	Images supplemental record – the most recent entry
Value at Acquisition, Basis	Appraisals supplemental record – the record must contain Accession as the entry in the Reason field
Current Value, Date, Basis	Appraisals supplemental record – the most recent entry

Restriction	Restrictions supplemental record – Y if there is an entry, N if the supplemental record is empty.
Reproduction	Reproduction field on the Catalog screen – Y if the entry is Reproduction, N if there is any other entry.
Publication Citation	Publication Citation supplemental record – Y if there is an entry, N if the supplemental record is empty.
Preservation Treatment	Preservation supplemental record – Y if there is an entry, N if the supplemental record is empty
Significance	Significance supplemental record – Y if there is an entry, N if the supplemental record is empty

Note: The program prints up to six lines of description on the catalog record from the Description memo field on the Catalog screen.

10-417 List of Objects

Use this form to attach lists of objects to loan and deaccession forms.

10-417 Field	***Maps From***
Park Acronym	Park Acronym
Catalog Number	Catalog Number (doesn't include acronym)
Accession Number	Accession Number
Item Count or Quantity	Item Count or Quantity
Object Name	Object Name or Scientific Name
Description and Condition	Description (top line), Condition (bottom line)
Value	Appraisals supplemental record - most recent entry

Note: You must complete the Comment and Number fields manually. If you want to print a blank form, use the **10-417 List of Objects.doc** report instead.

10-637 Object Condition Report

Use this report to document object condition for loans.

10-637 Field	***Maps From***
Catalog Number	Catalog Number
Accession Number	Accession Number
Object Name	Object Name or Scientific Name
Item Count	Item Count and Storage Unit
Component Parts	Parts

	Outgoing Loan Number	Loans Out associated module - if the object is attached to an outgoing loan
	Photograph Numbers	Images supplemental record
	Condition	Condition Description (memo field on the catalog record)

Note: You must complete the Condition Described By and Condition on Return of Object sections manually.

10-97 Temporary Removal Slip — Use this form in place of the object when you temporarily move the object.

10-97 Field	***Maps From***
Catalog Number	Catalog Number
Permanent Location	Location supplemental record - the record must contain Permanent as the entry in the Reason field
Purpose for Removal	Location supplemental record - the entry in the Reason field for the most recent location
Temporary Location	Location supplemental record - the location from the most recent location
Removed By	Location supplemental record - the entry in the Entered By field for the most recent location
Date Removed	Location supplemental record - the entry in the Start Date field for the most recent location

Accession List — Use this form to print a list of catalog records grouped by accession. The form prints the Accession number from the catalog record and the Acquisition Type, Acquisition Date and Source from the Accession record. A list of catalog records is included with the catalog number, component parts, object or specimen name, item count and quantity listed and totaled.

All Fields (Optional Catalog Record) — This report prints on 8½ x 11 inch paper. It prints all the fields on the record that contain data, including expanded memo fields, discipline-specific fields, and User fields.

Archeology Label — This is a box label for archeology collections. The label is not mapped. You must complete the label manually.

Worksheets:
Archeology worksheet.doc,
Archives Worksheet – Cultural Resources.doc,
Biology Worksheet.doc,
Ethnology Worksheet.doc,
Geology Worksheet.doc,
History Worksheet.doc,
Paleontology Worksheet.doc

These reports are Word documents that can be used as worksheets to fill out catalog records for the various disciplines to aid in data entry. Each will open in a Word window. Print as you would any other word document.

Catalog Number Log — This report prints a list of catalog numbers with the accession number and object/specimen name for each catalog number. Use this report whenever you need a simple list of catalog records to include in a file or send to someone.

<u>CMR Verification Reports:</u> *CMR Catalog Count for Tag,* *CMR Catalog Count for Year,* *CMR Deaccession Verification*	Refer to Appendix H: Collections Management Report for information on these verification reports. Use them to verify the data that the CMR pulls from your catalog directories.
DI-105 Receipt for Property	Use this form to document receipt of museum objects.

DI-105 Field	***Maps From***
Property	Catalog Number
Description	Object Name or Scientific Name - first line Description - second line
Quantity	Item Count
Unit of Issue	Storage Unit
Cost	Appraisals supplemental record - the most recent appraisal

The park name maps to the Bureau or Office line at the top of the DI-105. The park name maps from the NPS Unit entry in the Name and Address associated module. See Section B above. You must manually complete the names, signatures, and dates at the bottom of the form.

Missing Required Data for Cultural Records, *Missing Required Data for Natural History Records*	These reports run on the entire directory to list catalog records that have empty required fields. Make sure to run the appropriate report in the appropriate directory. Click <u>Run for All Visible Records</u> to get a list of all records with missing data. The list includes the catalog number and the required field(s) that are empty for that record.
Missing Required Data for Cultural Records – Draft Only, *Missing Required Data for Natural History Records – Draft Only*	These reports run on the entire directory to list catalog records that have Draft Record in the Object Status field. Make sure to run the appropriate report in the appropriate directory. Click <u>Run for All Visible Records</u> to get a list of Draft Records and the missing data. The list includes the catalog number and the required field(s) that are empty for that record.
Nag-ca, Nag-ca2, Nag-cui *(NAGPRA Inventory Update – Culturally Affiliated,* *NAGPRA Inventory Update – Culturally Unidentifiable)*	Run these reports on CR catalog records to print NAGPRA information contained in the old NAGPRA supplemental. These reports include the NAGPRA Module ID#, MNI, and Affiliated Tribes from the supplemental, plus accession number, catalog number, accession description, object description, counts (item count and quantity), storage unit, provenience (State Site #, County, State), manufacture dates and cultural information (Cultural ID, Hist/ Cult Period, NAGPRA) from the object record.
Object Caption List, *Specimen Caption List,* *Object Caption Report,* *Specimen Caption Report*	Run these reports on a single record or group of records to provide information for exhibits or loans. The CR captions print the object name, manufacture dates, artist/maker, material, measurements and catalog number. The NH captions print the scientific and common names, measurements and catalog number. The Lists print the information in horizontal format while the Reports print the information in vertical format.

Unique Accession Numbers, Unique Locations, Unique Names, Unique Storage Unit Entries	Run these reports on the entire directory or subsets of your data to print a list of unique entries for the field indicated in the report name. These can aid in standardizing names, locations, etc.

Note: Sort by the field name – accession number, location, object or scientific name or storage unit – before running the reports. See Section V of Chapter 7 for information on sorting your visible data.

Value

Run this report on subsets of your data to list and total the value of the objects. The list includes the catalog number and object/specimen name, and the most recent value from the Appraisals supplemental record. The report includes a total value for all the listed objects.

3. *What natural history labels are available in the Collection Records Module?*

ANCS+ includes all of the NPS natural history labels. These labels are mandatory for natural history collections. They include:

**10-500 Vertebrate Wet Specimen Label*

The fields map from the corresponding fields on the catalog record screen with the following exceptions:

10-500 Field	***Maps From***
Original Fixative	Preparation/Treatment associated module
Preservative	Preparation/Treatment associated module

Note: You must complete the Notes field manually.

**10-501 Vertebrate Specimen Label*

The fields map from the corresponding fields on the catalog record screen with the following exception:

10-501 Field	***Maps From***
Prepared By	Preparation/Treatment associated module

Note: To save paper, this label will print in columns if you choose 10-501c.

**10-502 Skull Vial or Box Label*

The fields on this label map from the corresponding fields on the catalog record screen.

Note: To save paper, this label will print in columns if you choose 10-502c.

**10-503 Invertebrate Specimen Label*

The Group field maps from the Class field. The Phylum maps from the Phylum/Division field. The Family maps from the Family field. The fields map from the catalog record screen with the following exceptions:

10-503 Field	***Maps From***
Original Fixative	Preparation/Treatment associated module
Preservative	Preparation/Treatment associated module

Note: You must complete the Taxon and Notes fields manually. Also, if your catalog data is still in the fields that were original to version 6.3, you should use the 10-503 Invertebrate Specimen Label – HCO for the fields to map correctly to the form.

**10-504 Geology Collection*

The fields on this label map from the corresponding fields on the catalog record screen.

Note: To save paper, this label will print in columns if you choose 10-504c.

**10-505 Paleontology Label*

The fields on this label map from the corresponding fields on the catalog record screen. You must complete the Notes field manually.

Note: To save paper, this label will print in small format if you choose 10-505b, or in columns if you choose 10-505c. Also, if your catalog data is still in the fields that were original to version 6.3, you should use the reports that have an "HCO" extension for the fields to map correctly to the form.

**10-506 Wet Plant Specimen Label*

The fields map from the corresponding fields on the catalog record screen with the following exceptions:

10-506 Field	***Maps From***
Original Fixative	Preparation/Treatment associated module
Preservative	Preparation/Treatment associated module

**10-507 Invertebrate Label*

The Group field maps from the Class field. The Phylum maps from the Phylum/Division field. The Family maps from the Family field. You must complete the Notes field manually. The other fields map from the corresponding fields on the catalog record screen with the following exceptions:

10-507 Field	***Maps From***
Original Fixative	Preparation/Treatment associated module
Preservative	Preparation/Treatment associated module

Note: To save paper, this label will print in columns if you choose 10-507c. Also, if your catalog data is still in the fields that were original to version 6.3, you should use the reports that have an "HCO" extension for the fields to map correctly to the form.

**10-508 Egg Box Label*

You must complete the Notes, A.O.U. No., Set Mark, Description of Nest, and Incu. fields manually. The other fields on this label map from the corresponding fields on the catalog record screen.

**10-509 Insect Label*

The fields on this label map from the corresponding fields on the catalog record screen.

Note: To save paper, this label will print extra small if you choose 10-509 Insect Label-Extra Small or in columns if you choose 10-509c Insect Label-Columns and extra small columns if you choose 10-509 Insect Label-Columns-Extra Small.

**10-510 Annotation Label*

The Accession Number and Catalog Number map from the catalog record. You must complete the annotation manually.

**10-511 Mineral Collection*

You must complete the Mine field manually. The other fields on this label map from the corresponding fields on the catalog record and accession record.

**10-512 Herbarium Collection*

The fields on this label map from the corresponding fields on the catalog record screen. Technical Name maps from the Scientific Name field.

4. *Where are some of the reports that were available in the previous version of **ANCS+**?*

Some of the reports from the previous version of **ANCS+** are now available as functions or were subsumed by other reports within the program. The following is a list of the previous reports that are now a function or included in other reports.

Previous Report	**New Function**
All Supplementals	Use the Full View print option to include supplemental information for a record. See Section IV below.
Authority Tables	The Browse Authority Table window allows you to print the selected authority table by clicking the Print link. (To view the authority table for a field, press Ctrl-F5 or right-click in the field and choose Browse Authority Table.)
Catalog Numbers Used	Choose the Fiscal Year Summary Report option on the Tools menu.
Center to Park	Choose the directory comparison option on the Tools menu.
FYsum	Choose the Fiscal Year Summary Report option on the Tools menu.
Missing Catalog Numbers	Choose the Fiscal Year Summary Report option on the Tools menu.
Totals by Discipline	Use the CMR Catalog Count for Tag or CMR Catalog Count for Year reports.

5. *How can I find out if I having missing or duplicate catalog numbers?*

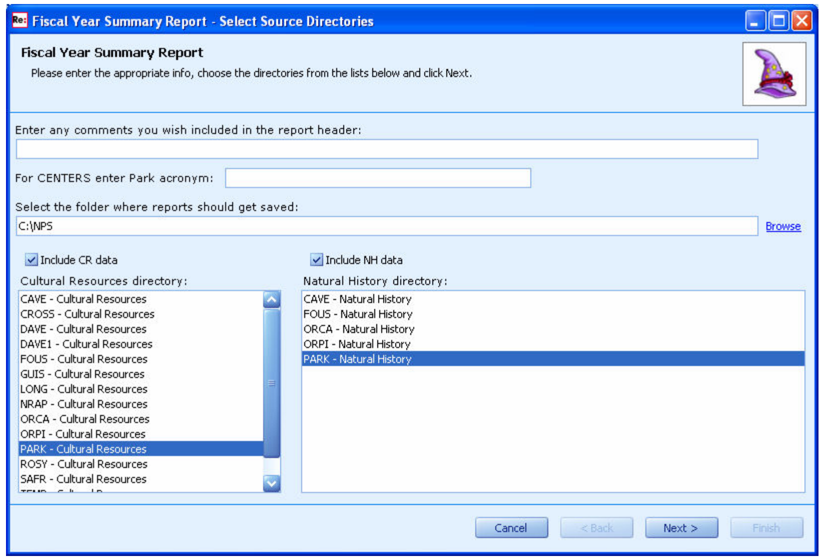
To find out if there are gaps or duplicate catalog numbers in your directories, use the Fiscal Year Summary Report option available on the Tools menu.

Note: This report can be run on a tag set or on your whole database.

6. *How do I run the Fiscal Year Summary Report?*

To run the Fiscal Year Summary Report:

- If you want to run the report on a subset of your data, first create a Tag Set in each directory of records for the fiscal year or other group of records.
- Go to the Tools menu and choose Fiscal Year Summary Report.



- On the Fiscal Year Summary Report window, enter any comments in the first field that you want to appear in the report header.

- If you are running the report on directories that contain records from multiple parks (such as at Centers), enter the park acronym in the second field for the park you want to run the report. Leave this field blank if your directories contain only a single park's records.

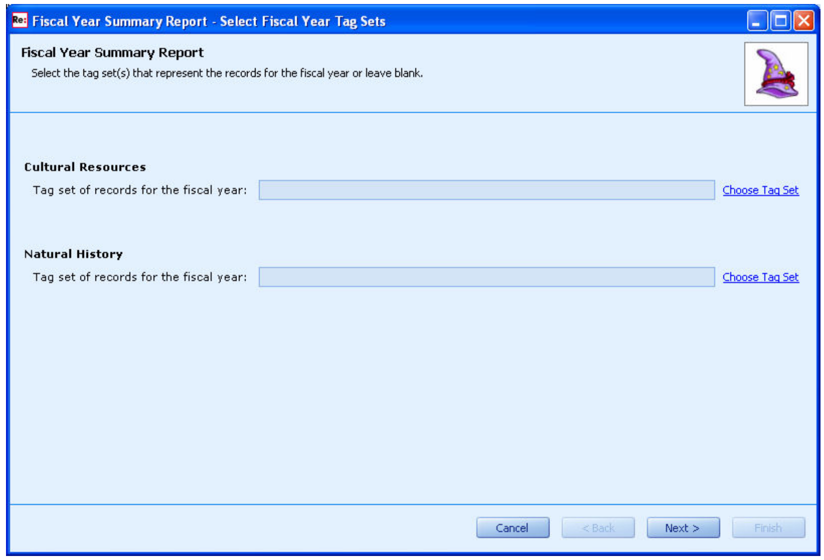
- Select the folder location where you want to save the report. You can either type the path of the folder or click the Browse link to select a folder to save the report.

- To select a directory from Cultural Resources and Natural History, check the Include CR data and Include NH data boxes. Uncheck either of these if you will be choosing only one directory.

- Highlight the director(ies) that contain your park data from the Cultural Resources directory list and/or the Natural History directory list.

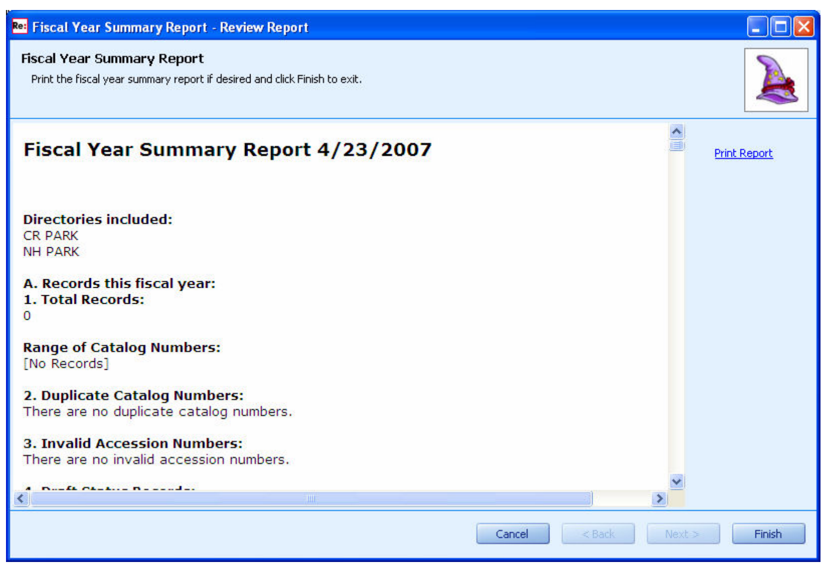
Note: If you want a complete report of all catalog numbers used, you should select both your Cultural Resources directory and Natural History directory if your unit has both types of catalog records.

- Click Next.



If you want to run the report…	*Then…*
on a Tag Set in your Cultural Resources and/or Natural History directories,	click the Choose Tag Set link next to each directory type and select the Tag Set from the list.
on all records in the directories selected,	leave these fields blank.

- Click Next.



- The Fiscal Year Summary Report will be displayed. You can scroll the report results.
- To print the report, click the Print Report link.
- Click Finish when done.

7. *What information does the Fiscal Year Summary Report include?*

The Fiscal Year Summary Report is the same report run by the National Catalog on your catalog submissions. The report is divided into two sections:

- Section A contains information on the catalog records for the current fiscal year only.
- Section B contains information on all catalog records in your director(ies) or selected Tag Set(s).

The information in each section includes:

- total number of records
- range of catalog numbers used
- duplicate catalog numbers
- invalid accession numbers
- draft records

Section B also lists the unique item counts, quantities and storage units.

D. Accession Records Forms and Reports

1. *What forms and reports are available from the Accession Records associated module?*

**10-255 Accession Folder Cover Sheet*

Use the 10-255 to document the contents of the accession folder. Preprinted folders are no longer available. Print the cover sheet, and place it inside an acid-free folder.

The program prints the accession folder cover sheet from your word processing system. You can complete the form manually or on the computer. See Section A.4 above for information on printing Word documents.

**10-830 Deed of Gift*

Use this form to document gifts to the park. A copyright statement has been added to this form. The program completes all sections of the form except the signature and date sections.

10-830 Field	***Maps From***
Accession Number	Accession Number
Name of Donor(s)	Prefix, First, and Last fields in the name and address record for the Source Individual; Name ID for the Source Institution
Telephone Number	Phone field in the name and address record for the source
Address	Address Line 1 and 2 and the City/St/Zip fields in the name and address record for the source

Description of Objects	Description – List of Objects subfield
Condition	Description – List of Objects subfield
Title	Title field in the NPS Unit record
Park	Div/Unit field in the NPS Unit record
Address	Address Line 1 and 2 and the City/St/Zip fields in the NPS Unit record

Note: For the list of objects with their conditions, enter description and condition in two columns that are thirty spaces apart in the List of Objects subfield of Description.

Use 10-830c Deed of Gift continuation if the list of objects exceeds 19 lines/items.

To print a blank form, use 10-830 Deed of Gift – Blank.doc which prints from your word processing system.

**10-95 Accession Receiving Report*

Use this form to document the receipt of accessions. The program completes all sections of the form except the signature and date sections.

10-95 Field	***Map From***
Accession Number	Accession Number
Park Name	Div/Unit field in the NPS Unit record
Attached Form	Custody Document (from Comments field)
Nature of Accession	Acquisition Type
Name and Address of Source	Name ID, Address Line 1 and 2, and City/St/Zip fields in name and address record for the source
Daytime Telephone No.	Phone field in the name and address record for the source
Description	Description (1st subfield only)
Project Name	Project Title (from Other Archeo field)
Condition	Condition (from Comments field)
Remarks	Other Comments (from Comments field)

**10-95c Accession Receiving Report Continuation*

Use this form if you have more than six lines of Description on the 10-95. The program completes all sections of the form.

10-95c Field	***Maps From***
Accession Number	Accession Number
Park Name	Div/Unit in the NPS Unit record
Description	Description (1st subfield only)

ACCCAT	Use this report to print a list of catalog records associated with the accession record. The report includes the accession number, acquisition type, source, number of catalog records, catalog number, object name, item count and object status.
Accession List	Use this report to print a list of accessions. The report includes the accession number, acquisition date, source, catalog record count and a list of the catalog numbers and object names associated with this accession from the current directory.
Accession Worksheet.doc	Use this form to print a worksheet to use when completing a new accession. This form prints as a Word document.
All Fields	Use this form to print all the fields on the record that contain data.
CMR Accession Verification	Refer to Appendix H: Collections Management Report for information on this verification report. Use it to verify the data that the CMR pulls from your accession records.
DI-105 Receipt for Property	Use this form to document receipt of museum objects. You can only print a blank DI-105 from the Accession Records associated module.
Missing Required Data for Accessions	Run this report on all visible accession records to locate records that have empty required fields. The report indicates the accession number and field that is missing data.
Source of Accession	Use this form to print a source of accession record. The program completes all sections of the form.

Source Field	***Maps From***
Source of Accession Name	Name ID for source
Source of Accession Address	Address Line 1 and 2 and City/St/Zip fields in the name and address record for source
Telephone	Phone field in the name and address record for source
Accession Numbers	Accession Number
Description	Description

Note: To print a source of accession record for all the accessions from one source:

- create a tag set or filter for all the records from the source
- print the source of accession for all visible records

E. Outgoing Loan Forms and Reports

1. *Where do I go to print outgoing loan forms and reports?*

Go to the Loans Out associated module to print outgoing loan forms and reports. This section contains a list of the forms and reports available in the Loans Out associated module. It also includes a list of the fields that map to the forms. Mandatory forms are marked with an asterisk (*).

2. *What forms and reports are available from the Loans Out associated module?*

**10-127 Outgoing Loan Agreement*

Use the outgoing loan agreement to document outgoing loans. You must print both pages of the agreement (see 10-127c) and attach the outgoing loan conditions (see 10-127a).

The program completes all sections on the first page of the outgoing loan agreement.

10-127 Field	***Maps From***
Outgoing Loan Number	Loan ID
NPS Unit (Lender)	Div/Unit field in the NPS Unit record
Street/Box	Address Line 1 and 2 fields in the NPS Unit record
City, State, Zip	City/St/Zip fields in the NPS Unit record
Telephone	Phone field in the NPS Unit record
Fax Number	Fax field in the NPS Unit record
Superintendent	First and Last fields in the NPS Unit record
Shipping Address	Alternate Address fields in the NPS Unit record
Borrowing Institution	Name ID field in the name and address (Borrower) record for the borrower
Department	Div/Unit field in the name and address record for the borrower
Street/Box	Address Line 1 and 2 fields in the name and address record for the borrower
City, State, Zip, Country	City/St/Zip fields in the name and address record for the borrower
Telephone	Phone field in the name and address record for the borrower
Fax Number	Fax field in the name and address record for the borrower
Responsible Official	Responsible Official

Title	Title field in the name and address record for the borrower
Shipping Address	Alternate Address fields in the name and address record for the borrower
NPS Status	NPS field in the name and address record for the borrower
Purpose of Loan	Purpose
Credit Line	Credit Line
Items in Loan	Objects
Initiation Date	Start Date
Termination Date	End Date
Insurance Paid By	Insurance Paid By
Insurance Co.	Insurer
Policy No.	Policy
Packer	Packer
Shipping Paid By	Shipping Paid by
Outgoing Method of Shipping	Shipping Method
Return Method of Shipping	Return Method

Note: For loans of more than a few objects, enter "See Attached List" in the Object field. Attach the List of Objects (Form 10-417) from the Collection Records Module. Refer to Section C.2 above.

To print a blank form to complete manually, use the 10-127 Blank Outgoing Loan Agreement.doc instead. This prints from your word processing system.

**10-127c Outgoing Loan Agreement Continuation*

This is the second page of the Outgoing Loan Agreement. You must print this report separately. The program completes all sections of this page except for signatures, dates, and the Return of Loan section.

10-127c Field	***Maps From***
Loan Conditions	Special
Name of Responsible Official (Borrower) and Title	First, Last, and Title fields in the name and address record for the borrower
Name of Superintendent	First, Last and Title fields in the NPS Unit record
Return Status	Return Status

Extension Termination Date	Date Extended

**10-127a Conditions for Outgoing Loans.doc*

Attach the two-page Conditions for Outgoing Loans to the Outgoing Loan Agreement.

The program prints the conditions from your word processing system. You must add the outgoing loan number in the upper right corner of each page. See Section A.4 above for information on printing Word documents.

10-640 Outgoing Loan Folder Cover Sheet

You must maintain your loan documentation in either an outgoing loan folder or the accession folder. Use the 10-640 to document the contents of the loan folder, if you use one. Print the cover sheet, and place it inside an acid-free folder.

The program completes sections A-C of the cover sheet. You must complete Sections D and E manually.

10-640 Field	***Maps From***
Outgoing Loan Number	Loan ID
Termination Date	End Date
Park Name	Div/Unit field in NPS Unit record
Type of Loan	NPS field in the name and address record for the borrower
Borrower	Borrower
Purpose	Purpose
Initiation Date	Start Date
Termination Date	End Date

Note: To print a blank form, use 10-640 Outgoing Loan Folder Cover Sheet – Blank.doc which prints from your word processing system.

10-641 Outgoing Loan Extension

Use the outgoing loan extension to extend an outgoing loan. The program completes all sections of the form except for signatures and date.

10-641 Field	***Maps From***
Outgoing Loan No.	Loan ID
NPS Unit (Lender)	Div/Unit field in the NPS Unit record
Street/Box	Address Line 1 and 2 fields in the NPS Unit record
City, State, Zip	City/St/Zip fields in the NPS Unit record
Telephone	Phone field in the NPS Unit record
Fax Number	Fax field in the NPS Unit record

Borrowing Institution (Borrower)	Name ID field in the name and address record for the borrower
Department	Div/Unit field in the name and address record for the borrower
Street/Box	Address Line 1 and 2 fields in the name and address record for the borrower
City, State, Zip, Country	City/St/Zip fields in the name and address record for the borrower
Telephone	Phone field in the name and address record for the borrower
Fax Number	Fax field in the name and address record for the borrower
Responsible Official	Responsible Official
Title	Title field in the name and address record for the borrower
Original Initiation Date	Start Date
Original Termination Date	End Date
Length of Extension Requested	Extension - Request Len Ext
Items in Loan	Objects
Length of Extension Granted	Extension - Length of Ext
Extended Termination Date	Extension - Date Extended
Extension Not Granted	Extension - Ext Not Granted
Previous Extensions	Extension - Previous Extensions
Additional Conditions/ Comment	Extension - Comments

Note: To print a blank form, use 10-641 Outgoing Loan Extension – Blank.doc which prints from your word processing system.

Outgoing Loan List

Use this report to print selected fields from the loan record that includes a list of objects in the loan.

F. Incoming Loan Forms and Reports

1. *Where do I go to print incoming loan forms and reports?*

Go to the Loans In associated module to print incoming loan forms and reports. This section contains a list of the forms and reports available in the Loans In associated module. It also includes a list of the fields that map to the forms. Mandatory forms are marked with an asterisk (*).

2. *What forms and reports are available from the Loans In associated module?*

**10-98 Incoming Loan Agreement*

Use the incoming loan agreement to document incoming loans. You must print both pages of the agreement (see 10-98c) and attach the incoming loan conditions (see 10-98a).

The program completes all sections on the first page of the incoming loan agreement.

10-98 Field	***Maps From***
Accession No.	Accession #
NPS Unit (Borrower)	Div/Unit field in the NPS Unit record
Street/Box	Address Line 1 and 2 fields in the NPS Unit record
City, State, Zip	City/St/Zip fields in the NPS Unit record
Telephone	Phone field in the NPS Unit record
Fax Number	Fax field in the NPS Unit record
Superintendent	First and Last fields in the NPS Unit record
Shipping Address	Alternate Address fields in the NPS Unit record
Lender	Name ID field in the name and address record for the lender
Department	Div/Unit field in the name and address record for the lender
Street/Box	Address Line 1 and 2 fields in the name and address record for the lender
City, State, Zip, Country	City/St/Zip fields in the name and address record for the lender
Telephone	Phone field in the name and address record for the lender
Fax Number	Fax field in the name and address record for the lender
Responsible Official	Responsible Official
Title	Title field in the name and address record for the lender
Shipping Address	Alternate Address fields in the name and address record for the lender

NPS Status	NPS field in the name and address record for the lender
Purpose of Loan	Purpose
Credit Line	Credit Line
Objects in Loan	Objects
Initiation Date	Start Date
Termination Date	End Date
Insurance Paid By	Insurance Paid By
Insurance Co.	Insurer
Policy No.	Policy
Packer	Packer
Shipping Paid By	Shipping Paid by
Outgoing Method of Shipping	Shipping Method
Return Method of Shipping	Return Method

Note: You cannot attach a List of Objects (Form 10-417) to an incoming loan unless you catalog the objects.

To print a blank form to complete manually, use the 10-98 Blank Incoming Loan Agreement.doc instead. The blank report prints from Microsoft Word.

**10-98c Incoming Loan Agreement Continuation*

This is the second page of the Incoming Loan Agreement. You must print this report separately. The program completes all sections of this page except for signatures, dates, and the Return of Loan section.

10-98c Field	***Maps From***
Loan Conditions	Special
Name of Responsible Official (Lender) and Title	First, Last, and Title fields in the name and address record for the lender
Name of Superintendent	First, Last and Title fields in the NPS Unit record
Return Status	Return Status
Extension Termination Date	Date Extended

**10-98a Conditions for Incoming Loans.doc*

Attach the Conditions for Incoming Loans to the Incoming Loan Agreement.

The program prints the conditions from your word processing system. See Section A.4 above for information on printing Word documents.

10-98b Incoming Loan Extension

Use the incoming loan extension to extend an incoming loan. The program completes all sections of the form except for signatures and date.

10-98b Field	***Maps From***
Accession No.	Accession #
NPS Unit (Borrower)	Div/Unit field in the NPS Unit record
Street/Box	Address Line 1 and 2 fields in the NPS Unit record
City, State, Zip	City/St/Zip fields in the NPS Unit record
Telephone	Phone field in the NPS Unit record
Fax Number	Fax field in the NPS Unit record
Lender	Name ID field in the name and address record for the lender
Department	Div/Unit field in the name and address record for the lender
Street/Box	Address Line 1 and 2 fields in the name and address record for the lender
City, State, Zip, Country	City/St/Zip fields in the name and address record for the lender
Telephone	Phone field in the name and address record for the lender
Fax Number	Fax field in the name and address record for the lender
Responsible Official	Responsible Official
Title	Title field in the name and address record for the lender
Original Initiation Date	Start Date
Original Termination Date	End Date
Length of Extension Requested	Extension - Request Len Ext
Items in Loan	Objects
Length of Extension Granted	Extension - Length of Ext
Extended Termination Date	Extension - Date Extended
Extension Not Granted	Extension - Ext Not Granted
Previous Extensions	Extension - Previous Extensions
Additional Conditions/ Comment	Extension - Comments

Note: To print a blank form, use 10-98b Incoming Loan Extension – Blank.doc which prints from your Microsoft Word.

Incoming Loan List

Use this report to print selected fields from the loan record that includes a list of objects in the loan (if the objects are cataloged).

G. Deaccession Forms and Reports

1. *Where do I print deaccession forms and reports?*

Go to the Deaccessions associated module to print deaccession forms and reports. This section contains a list of the forms and reports available in the Deaccessions associated module. It also includes a list of the fields that map to the forms. Mandatory forms are marked with an asterisk (*).

2. *What forms and reports are available from the Deaccessions associated module?*

**10-643 Deaccession Form*

Use this form to document deaccessions. The program completes all sections of the form except the signature and date sections.

10-643 Field	***Maps From***
Deaccession Number	Deaccession Number
Park Name	Div/Unit field in the NPS Unit record
Deaccession Type	Deaccession Type
Disposition of Object Outside SOC	Non-SOC
Recipient	Recipient
Objects in Deaccession	Objects
Number of Objects	Total Deaccession
Value	Value
Disposition Document	Disposition Document
Attachments	Attachments
Notes on Deaccession	Notes
Deaccession Recommended	Recommended Deaccession
Disposition Recommended	Recommended Disposition
Deaccession Approved	Approved Deaccession
Disposition Approved	Approved Disposition
Superintendent	First and Last fields in the NPS Unit record

Note: For deaccessions of more than a few objects, enter "See Attached List" in the Object field. Attach the List of Objects (Form 10-417) from the Collection Records Module. Refer to Section C.2 above.

10-644 Deaccession Folder Cover Sheet.doc

You must maintain your deaccession documentation in either a deaccession folder or the accession folder. Use the 10-644 to document the contents of the deaccession folder, if you use one. Print the cover sheet, and place it inside an acid-free folder.

The program prints the deaccession folder cover sheet from your word processing system. You can complete the form manually or on the computer. See Section A.4 above for information on printing Word documents.

**10-99 Conveyance Agreement*

Use the conveyance agreement to document donations to institutions or organizations that meet the requirements on the form.

The program completes all sections of the form except certification, signature and date sections.

10-99 Field	***Maps From***
Deaccession Number	Deaccession Number
Conveyance To Name	Recipient
Address (Street/Box)	Address Line 1 and 2 fields in the name and address record for the recipient
City, State, Zip	City/State/Zip fields in the name and address record for the recipient
Telephone	Phone field in the name and address record for the recipient
Fax	Fax field in the name and address record for the recipient
Description	Objects
Park Name	Div/Unit in the NPS Unit record
Park Address (Street/Box)	Address Line 1 and 2 fields in the NPS Unit record
City, State, Zip	City/St/Zip in the NPS Unit record
Fax Number	Fax field in the NPS Unit record
Superintendent	Superintendent
Name and Title of Responsible Official	First, Last, and Title fields in the name and address record for recipient

**DI-104 Transfer of Property*

Use the transfer of property to document transfers within the Federal government. The program completes the following sections of the form.

DI-104 Field	***Maps From***
Date	Deaccession Date

Transfer From	Div/Unit, Address Line 1 and 2, and City/St/Zip fields in NPS Unit record
Transfer To	Name ID, Address Line 1 and 2, and City/St/Zip fields in the name and address record for recipient
Quantity or Property ID No. and Item Description	Catalog # and Object name from Deaccession Items page
Date Shipped	Ship Date
Official Title	Title field in NPS Unit record

The program only completes the DI-104 if you have attached the list of objects to the Deaccession Items page. Use the DI-104 Transfer of Property Blank Form.doc to print a blank form to complete manually.

Exchange Agreement.doc

Use the exchange agreement to document exchanges.

The program prints the two-page exchange agreement from your word processing system. You must add the deaccession number in the upper right corner of each page. See Section A.4 above for information on printing Word documents.

Repatriation Agreement.doc

Use the repatriation agreement to document repatriations.

The program prints the two-page repatriation agreement from your word processing system. You must add the deaccession number in the upper right corner of each page. See Section A.4 above for information on printing Word documents.

Specialist Review Form

Use the optional specialist review form to record the comments and recommendations of the collections advisory committee.

The program completes the following sections of the form.

Specialist Field	***Maps From***
Description	Notes
Deaccession Type	Deaccession Type
Disposition Type	Non-SOC

H. Visitor Access Forms and Reports

1. *Where do I go to print visitor access forms and reports?*

Go to the Names and Addresses associated module to print visitor access forms and reports. This section contains a list of the forms and reports available in the Names and Addresses associated module. It also includes a list of the fields that map to the forms. All the visitor access forms are optional.

2. *What forms and reports are available from the Names and Addresses associated module?*

Copyright Notice

Print the copyright and privacy restrictions for visitors and researchers to sign. This form is not mapped.

Note: This form is also available in the Archives-Collection Records. See Appendix F: Archives Module.

Duplication Form (Researcher Duplication Form)

Print the researcher duplication form to document duplication requests. The program prints a blank form. This form is not mapped.

Researcher Registration Form

Print the researcher registration form to document research in the collection. The program completes part of the form as follows.

Researcher Field	***Maps From***
Name	First and Last fields in the name and address record for the researcher
Date	Current date from the computer
Institutional Affiliation	Div/Unit in the name and address record for the researcher
NPS Status	NPS field in the name and address record for the researcher
Work Address	Address Line 1 and 2, City/St/Zip in the name and address record for the researcher
Phone	Phone field in the name and address record for the researcher
Fax	Fax field in the name and address record for the researcher
E-Mail	Email field in the name and address record for the researcher

Visitor Log.doc

Use the visitor log as a sign-in sheet for visitors to the collection. The program prints the visitor log from your word processing system. See Section A.4 above for information on printing Word documents.

Visitor Log Conditions.doc

Give the conditions for access to museum collections to visitors to the collection. The program prints the conditions for access to museum collections from your word processing system. See Section A.4 above for information on printing Word documents.

I. Other Forms and Reports

1. *What other forms and reports are available in **ANCS+**?*

ANCS+ contains several other forms and reports that are located as follows:

Form 10-349 (Inventory of Museum Property)	Refer to Appendix I: Automated Inventory Program.

Form 10-94 (Collections Management Report)	Refer to Appendix H: Collections Management Report.
Checklist for Preservation and Protection of Museum Collections and related reports	Refer to Appendix J: Automated Checklist Program.
Maintenance Task Sheets and Schedules	Refer to the Maintenance associated module (Section VI of Chapter 4).
Exhibit List	Refer to the Exhibits associated module (Section III of Chapter 4).
NAGPRA Inventory	Refer to the NAGPRA associated module (Section XIII of Chapter 4).
NAGPRA Items	Refer to the NAGPRA associated module (Section XIII of Chapter 4).
Form 10-96 (Folder List)	Refer to Appendix F: Archives Module
Form 10-645 (Separation sheet)	Refer to Appendix F: Archives Module
Container List for Archives and other archives related reports	Refer to Appendix F: Archives Module

II. PRINT LIST PANE

A. Overview

1. *What are the Print List and Print Preview buttons?*

Use these functions to send the data in the List Pane to the printer, export the data to a file or send it through email.

2. *When would I use Print List or Print Preview?*

Use the Print List and Print Preview to quickly print or save a list of records you are working with.

3. *Can I select different fields to print or export?*

Yes. Using the Update My List View option on the View menu, you can select which fields you want to view in the List Pane and then print or export them. The Print List and Print Preview will only show the fields that are in the List Pane.

Refer to Section V of Chapter 7 for information on My List View.

4. *Can I include images in the print list?*

Yes. If you select the Show Images in List Pane option from the View menu before printing or previewing the list, the thumbnails will print on the list.

5. *Where can I use the Print List and Print Preview functions?*

You can use Print List and Print Preview in any module or associated module in the program as long as the List Pane is active.

B. Print the List Pane

1. *How do I print the List Pane?*

To print the data in the List Pane:

- Activate a tag set, filter or quick filter in the List Pane. If you do not limit your visible data, printing the List Pane will print the entire directory. **Note:** Selecting multiple records in the List Pane <u>does not</u> limit your data for this function. The entire directory will still print.

- Click the Print List button  on the button bar, or select Print List from the File menu.

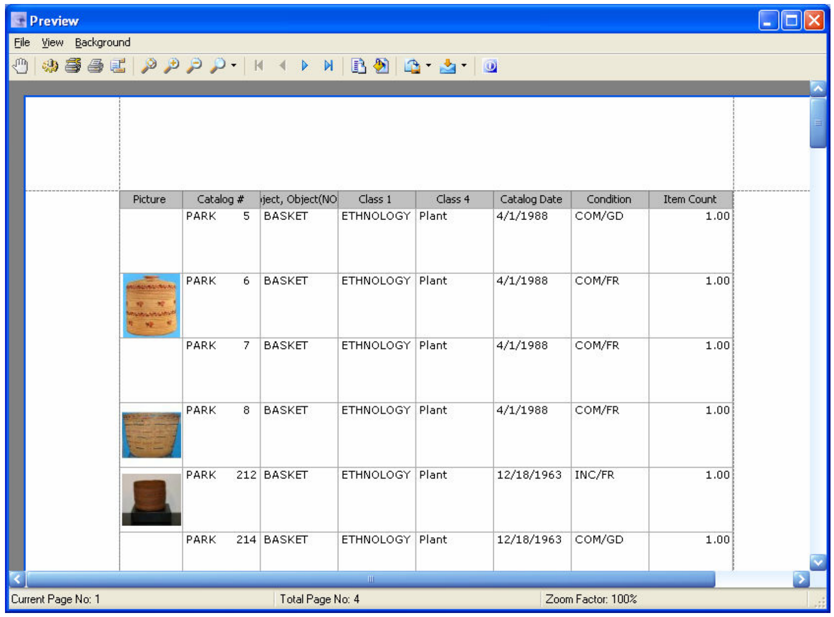
The file will be sent directly to your default printer. There is no preview of the file with this option.

2. *How can I preview the list before I print it?*

To preview the list before sending it to the printer:

- After selecting a subset of your data, click the Print Preview button  on the button bar, or select Print Preview from the File menu.

- The Preview window will open.



- To print the preview, click either the Print button or the Print Direct button on the toolbar in the preview window.

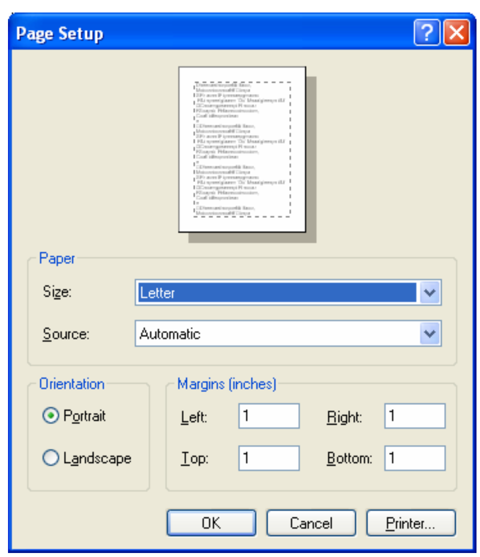
  Print ( ): opens your printer dialog window allowing you to select the printer and printer properties.

  Print Direct ( ): sends the list directly to the default printer as defined in your Windows Printers and Faxes setup.

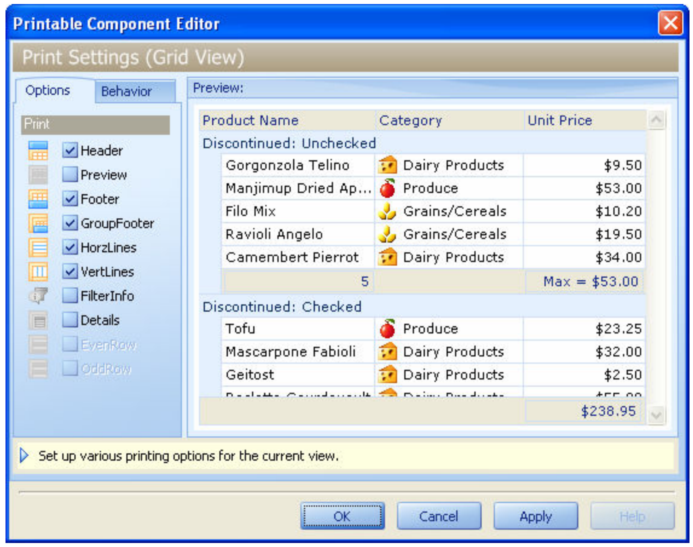
3. *Can I make any changes to the format of the list?*

Yes, there are several options on the toolbar that allow you to make changes to the layout and style.

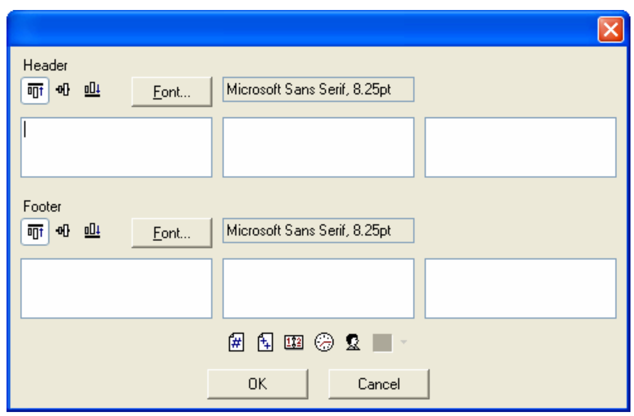
- From the File menu, choose Page Setup to change the margins and paper orientation. **Note:** You can also change the margins by clicking and dragging the dotted lines on the page.



- Choose the Customize button to select grid view Options (such as including header and footer bands, whether to print horizontal and vertical lines, include the filter information) or Behavior (such as using Auto Width or Print Styles).

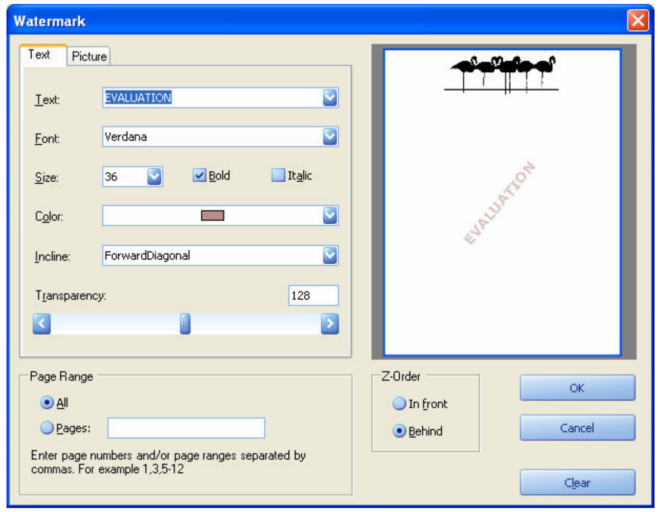


- Choose the Header and Footer button to insert text in the header and/or footer sections of the preview. In the Header and Footer window, you can choose the font of the header or footer text, insert page numbers, date and time, and your user name.



- Choose the Background button to change the color of the background. **Note:** This changes the color of the entire page, not the text or grid.

- Choose the Watermark button to include a watermark on the page such as text or an image or both.



4. *What are the other preview options?*

In the Preview window you can also:

- Use the Hand button to move the page around on the screen.
- Zoom in and out with the magnifier buttons.
- Scroll through the pages using the arrow buttons.
- Select multiple pages to view at the same time.
- Export (save) the list to a file.
- Send the list in an email.

C. Export the Print Preview

1. *In what formats can I save the Print Preview?*

You have two options for file formats to export the print preview:

PDF Document
Graphic Document (e.g., bmp, jpg, gif, etc.)

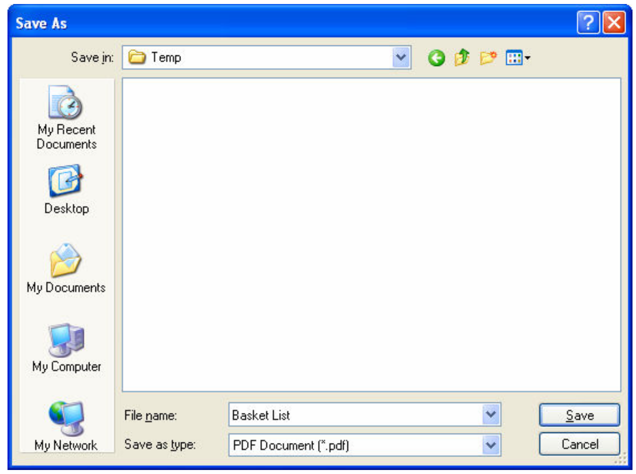
Note: Both options will include images if images are shown in the List Pane.

If you want to export the list in another format, use the Export options on the File menu under Import/Export in the main program window. There, you can export the List Pane to other formats such as Excel and Text files. See Section III of Chapter 8 for information on using the Export List options.

2. *How do I export the preview to a file?*

To export the print preview to a file:

- Click on the pull down menu attached to the Export Document button on the toolbar in the Print Preview window.
- Choose a file format. The Save As window will open.



- Select a location to save the file from the Save in pull down at the top.
- Enter a file name and click Save.

D. Send the Print Preview in an Email

1. *What file formats are available for sending the list in an email?*

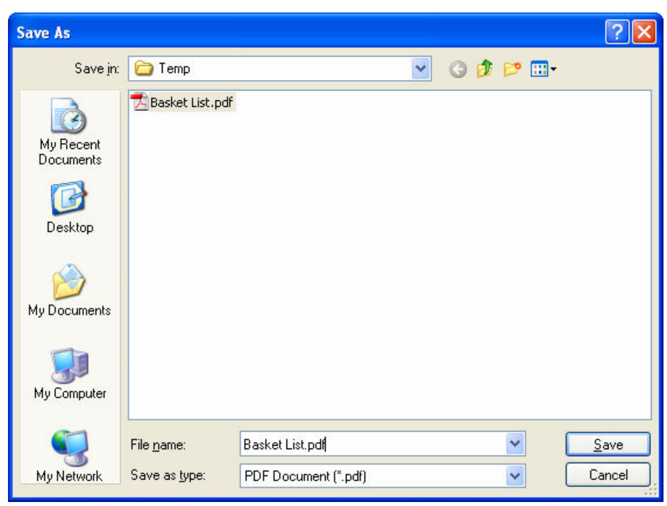
The file formats are the same as exporting:

PDF document
Graphic document

2. *How do I send an email with the print preview list attached?*

To email the print preview list to someone:

- On the toolbar in the Print Preview window, click the Send Email pull down and select a file format. The Save As window will open. Note: you must first save the list before you can email it.



- Select the location, enter a file name and click Save.
- Your email program will open automatically in a new message window with the file already attached. You only need to address it and send.

III. QUICK REPORT

A. Overview

1. *What is Quick Report?*

Quick Report allows you to create report templates that you can use over and over again to generate reports on your collections. You can create Quick Reports in any module including associated modules.

2. *When will I use this function?*

Use this function when you need to:

- create a list of selected **ANCS+** fields (such as a list of all the objects being considered for an exhibit)
- refer to a printed list of data from specific records (such as a list of the catalog numbers and object names for all the objects in a specific storage location)
- save a list to another file format such as PDF, HTML, Text, etc.
- email a list to others in a format they can use outside of **ANCS+**

You must run separate reports for CR and NH data. You cannot combine directories.

Tip: For a quick list of a few fields that you do not need to save, use the Print List Pane option described in Section II of this chapter.

3. *Why would I use Quick Report instead of one of the NPS forms?*

With Quick Report, you can choose the fields that you wish to include in your report and produce the report quickly and easily. It gives you the flexibility of deciding exactly which fields you want. You can select what information to include on your reports: up to 25 fields, default image, institutional name, current date/time/day, institutional image, etc. And you can rearrange it to suit your needs.

4. *What steps do I follow to create a Quick Report?*

Producing a Quick Report is a multi-step process. You must:

- Create a subset of your data by performing a Word Search, activating a filter or Tag Set, or selecting multiple records in the List Pane using Shift-click or Ctrl-click. Refer to Chapter 7, Finding & Grouping Records, for information about creating subsets.
- Create a Quick Report template or choose an existing template.
- Run the report. (The system makes a report of the data content of each field in your template. It lists the data for those fields for each record in your visible data.)
- View, print or export the report that you created.

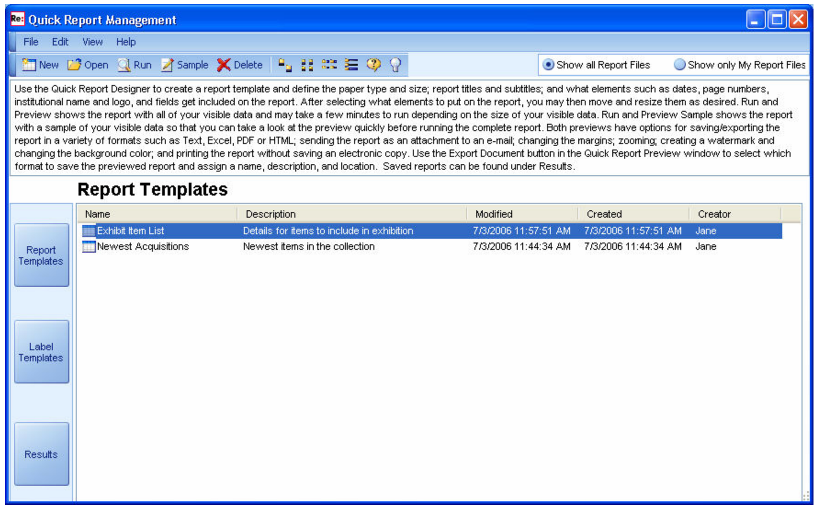
Note: The template you create can be used again and again with different subsets of data.

5. *How do I access the Quick Report function?*

Access Quick Report from any collection record or associated module.

To get to the Quick Report function:

- click the Quick Report button on the button bar, *or*
- select "Quick Report" under Reports on the Record menu



Note: The ability to create Label Templates is Coming Soon.

B. Creating a Quick Report Template

1. *How do I create a Quick Report Template?*

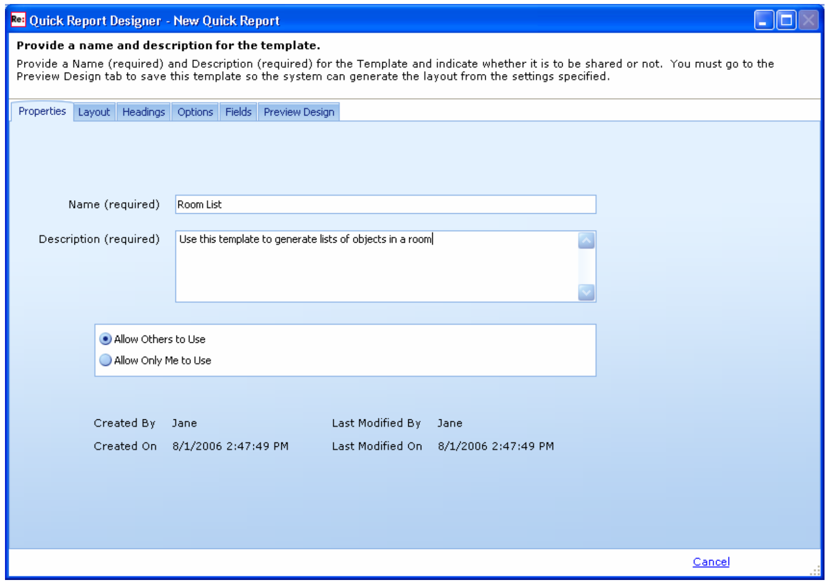
In the Quick Report Management window:

- Select Report Templates along the left edge if it is not already selected.
- Click New on the button bar or select New from the File menu.

This opens the Quick Report Designer window where you define the paper type and size; report titles and subtitles; and what elements such as dates, page numbers, institutional name and logo, and fields to include on the template. Just fill in the information on each tab, saving the Preview Design tab for last. The Preview Design tab is where you can move and resize elements on the template as the last step before saving the template.

Note: You must go to the Preview Design tab to save a template so the system can generate the layout from the settings specified.

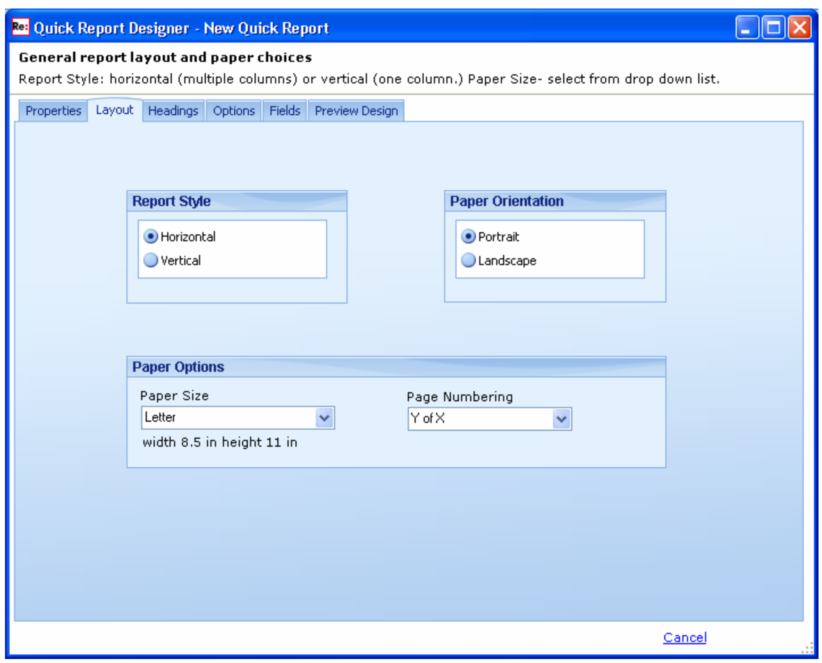
Properties Tab



On the **Properties Tab**,

- Fill in a name and description for the template (these are required).
- Indicate whether or not you want to share this template with other users.
- Click on the Layout tab next.

Layout Tab



On the **Layout Tab**,

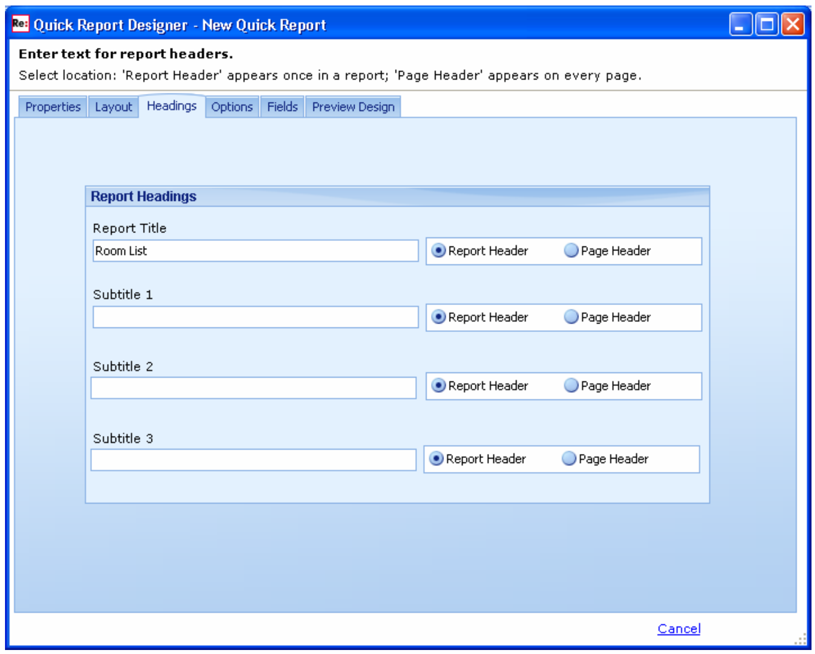
- Choose a Report Style:

  <u>Horizontal</u>: prints in a table/column format. All fields will word wrap and the columns will be the same width so fields with a lot of text like a description may take up a lot of space on the report and push it to several pages.

Vertical: prints the complete contents of each field for each record aligned at the left margin. **Note:** If you choose this option, you cannot make adjustments to the field size and location on the Preview Design tab.

- Choose the Paper Orientation: Portrait or Landscape
- Choose the Paper Options: Letter, Legal, etc
- Choose the Page Numbering style
- Click on the Headings tab next.

Headings Tab



On the **Headings Tab**,

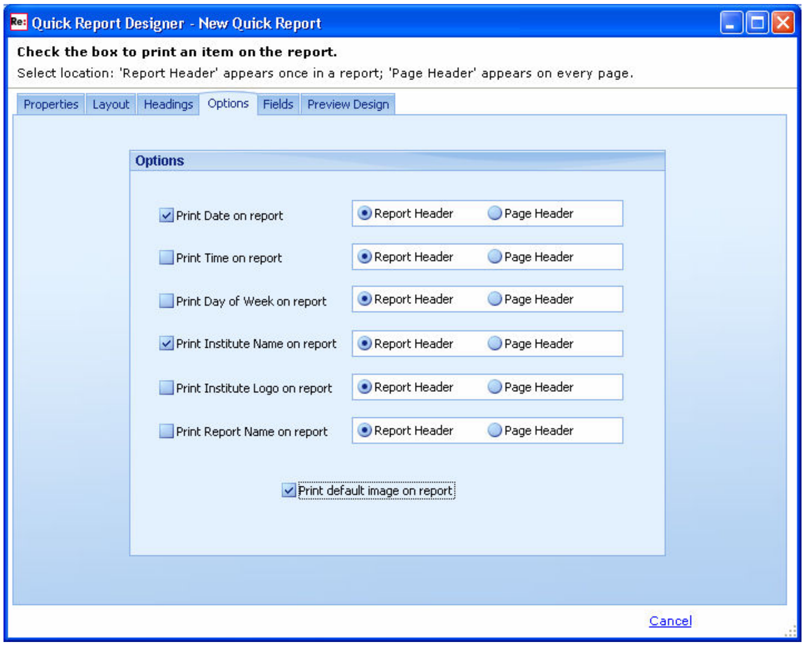
- Specify any title or subtitles to appear on the report and their location on the report.

  Report Header option puts the title in the header of the first page of the report.

  Page Header option puts the title in the header of every page.

- Click on the Options tab next.

Options Tab



On the **Options Tab**,

- Select any of the options desired and their location on the report.

  Report Header option puts the information in the header of the first page of the report.

  Page Header option puts the information in the header of every page.

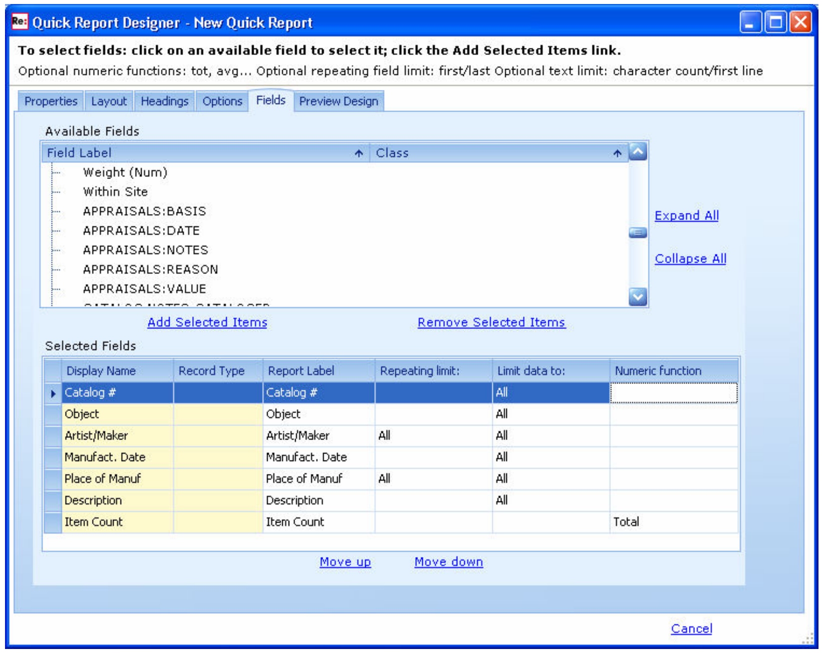
Note: Institute Name will be the name on the title bar (Rediscovery for the National Park Service) and Institute Logo will be the NPS arrowhead logo. The Report Name is the name of the quick report template that you entered on the Properties tab.

- Select whether to include images on the report.

Note: The default image is the first image displayed on the Images tab with each record.

- Click on the Fields tab next.

Fields Tab

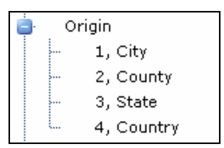


Adding fields to the template

On the **Fields Tab**, specify which fields to include on the report.

- In the Available Fields list, highlight the field(s) you want to include in the report. You can use Shift-Click and Ctrl-Click to select multiple fields.

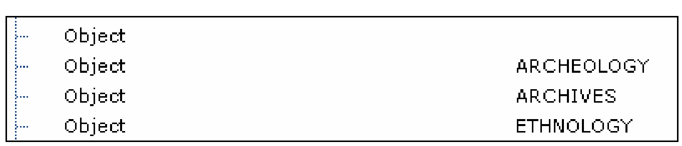
  For formatted memo and repeating formatted memo fields, you can select the entire field or individual subfields. To select a subfield, expand it in the list by clicking the blue plus sign next to it and select individual subfields.



  Supplementals appear at the end of the Available Fields list in all capitals. Each supplemental subfield is listed individually.

  Note: Use Expand All and Collapse All to expand and collapse all formatted memo and repeating formatted memo fields in the list.

  Some fields are associated with a particular Class (or discipline) and you will see the Class listed in the list of Available fields. If you select a field associated with a particular class, it will only print on the report for records of that same discipline. Some fields may appear more than once if they are associated with multiple disciplines. For instance, in the illustration below, the Object field is listed for Archeology, Ethnology, Archives, and a blank class.



If you select Object for the Archeology class, then the data from the Object field will print only for records whose class is also Archeology. If you select Object where the class is blank, the Object field will print for all records.

- Click Add Selected Items to add the highlighted items to the Selected Fields list.

Changing the field order

To rearrange the field order, highlight a field in the Selected Fields list and use **Move up** and **Move down** to move it to a different location.

Removing fields from the template

To remove a field from the Selected Fields list:

- highlight the field in the Selected Fields list
- click Remove Selected Items

Changing a report label

To change how the field label displays and prints on the report:

- In the Selected Fields list, click on the Report Label for the field you want to change.
- Enter a new label to appear on the report.

Repeating Limit

Specify whether the first, last, or all entries in a supplemental or repeating formatted memo print on the report. This option is only available for repeating fields (supplementals and repeating formatted memos).

Changing the field length

Use the "Limit Data to" column in the Selected Fields list to specify whether the entire field prints on the report or only a certain number of characters. Select a number from the pull down list for the field.

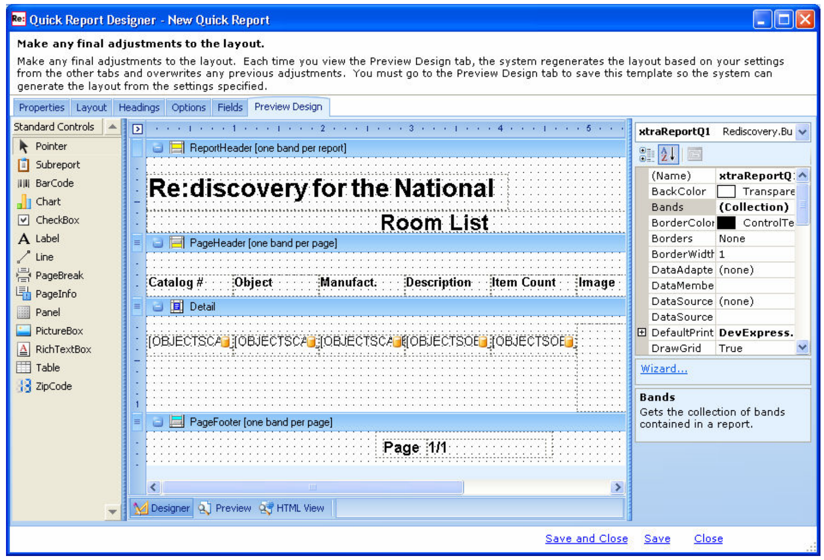
Note: If you use the Horizontal style and include a memo field that contains a lot of text, like a Description field, you may want to limit how much of that text prints on the report in order to save paper by not printing the entire contents of lengthy fields.

Numeric function

Use the "Numeric function" column to specify any calculations for a numeric field. Leave this blank if you do not want any calculations. Choose from Average, Count, Maximum, Minimum or Total in the pull down list. This option is only available for numeric fields.

Preview Design Tab

Once you've selected all the elements and fields to include in your template, click the Preview Design Tab. It will take a moment to generate the layout based on your choices. As it is working, you will see "Loading . . ." in the lower left corner of the window. When it finishes generating the template layout, it will display in the tab.



There are 3 views available on this tab. Choose one of the options in the lower left of the layout box:

- Designer: Allows you to change the layout, font, colors and other features in the quick report.
- Preview: Allows you to see the report as it will appear when printed. No data is visible in this view – only the headers, footers and field labels.
- HTML View: Shows the report in an HTML window.

Designer View

On the Designer view, you can make any final adjustments to the physical layout if desired.

Each time you go to a different tab (Fields, for example, to add another field) and then return to the Preview Design tab, the system regenerates the layout based on your settings from the other tabs and overwrites any previous adjustments.

Report Header Band

Shows the report headers you chose on the Headings and Options tabs.

Page Header Band

Shows the page headers you chose on the Headings and Options tabs and includes the field labels for the fields you chose.

Detail

Shows the layout of the data fields. These fields will begin with the name of the table they are associated with and then the name of the field.

Making changes to the layout

You can make changes to the layout by selecting an item in one of the bands that you want to change.

- To change the location, click and drag the item to a new location in the band. You can also use the arrow keys to make minor adjustments to the position. **Note:** If you chose the Vertical option on the Options tab, you will not be able to move the fields in the detail band.
- To change the font, click on an item. In the Tools box on the right, scroll through the list and locate the Font option. Select a new font by

clicking on the button to the right of the Font name that appears in the Font box.

- To remove an item, select it and press Delete.
- To change the size of an item, select it and use the mouse to drag the edges of the box to shrink or enlarge the item. **Note:** If you chose the Vertical option on the Options tab, you will not be able to resize the fields in the detail band.

When finished, click **Save and Close** to save the template. You will return to the Quick Report Management window and will see your new template in the list.

2. *How do I edit an existing Quick Report template?*

You can edit an existing template to change any of the fields or elements that appear on the report and to make adjustments to the layout.

To edit an existing template, from the Quick Reports Management window:

- Select the template in the list in the Report Templates list.
- Click the Open button  or select Open on the File menu.
- The template will open in the Quick Report Designer.
- To just make adjustments to the layout itself, use the Preview Design tab. If you need to make changes from any other tab, you can click on that tab, make any necessary changes, and then return to the Preview Design tab to save your template. If you open a template and leave the Preview Design tab, when you return the system will regenerate the layout overwriting any previous adjustments. You can readjust the layout if necessary.

Note: You must go to the Preview Design tab to save the report. If you click Cancel on any of the other tabs, the changes you make will be lost.

- Choose one of the following save options when editing a template:

Save as New – Use this save option if you want to create a new template from an existing template. If you edit a template and change the name on the Properties tab, this option appears on the Preview Design tab. If you choose this save option, the system will create a new template with any changes you made and with the name you entered on the Properties tab. The original template that you opened will remain unchanged.

Save and Close – Use this save option if you want to overwrite the template you opened. If you change the name of that template on the Properties tab, the system will rename and overwrite the existing template with the new name you entered on the Properties tab.

3. *How do I delete a Quick Report template?*

To delete a Quick Report template:

- In the Quick Reports Management window, select the template on the Report Templates list.
- Click Delete on the button bar. The template will be deleted.

C. Running a Quick Report

1. *How do I run the Quick Report?*

Once you've created a template, you can use it over and over again to generate reports that look the same but are run on different data sets. Create a subset of your records using Quick Search, Advanced Search, Quick Filter, Advanced Filter, or by selecting multiple records in the List Pane using Shift-Click or Ctrl-Click. When you run a Quick Report, it only runs on the visible data.

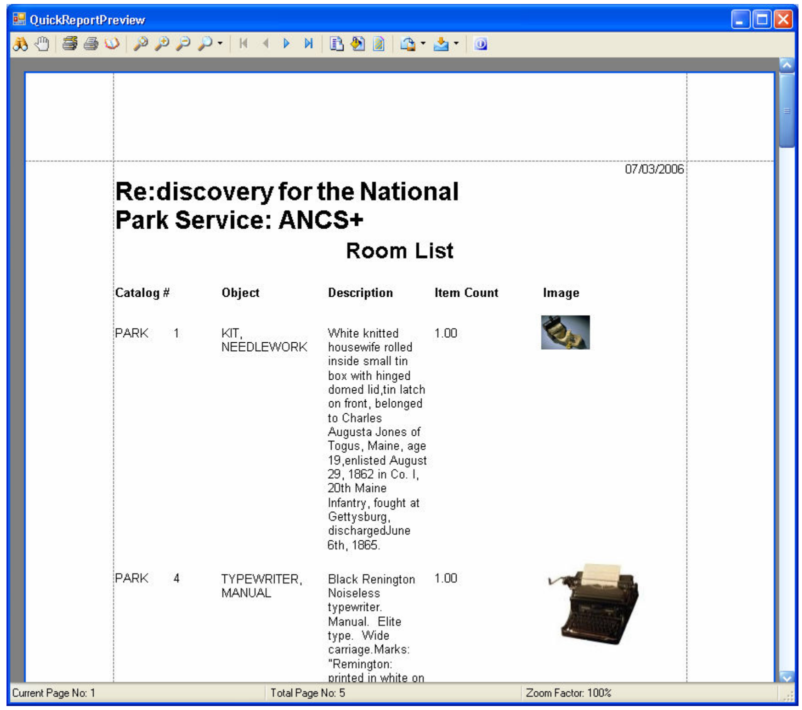
To run a Quick Report:

- In the Quick Reports Management window, select Report Templates along the left edge if it is not already selected and then click on the template you want to use. If not all report templates are visible, make sure to select Show All Report Files in the upper right corner of the Quick Report Management window.
- Select one of the Run options on the button bar or from the File menu:

  Run and Preview Sample : Shows the report with a sample of your visible data so that you can take a look at the preview quickly before running the complete report.

  Run and Preview **:** This option gives you the choice of running the report on all visible data or the current record only (the record that appears in the Record Pane). Choosing All Visible runs the report on all of your visible data and may take a few minutes to run depending on the size of your visible data.

Both options open the report in a Quick Report Preview window.



2. *What formatting options do I have before I print the report?*

There are also several formatting buttons on the button bar. On the Quick Report Preview window you can also:

- drag the dotted lines along the edge to adjust the paper margins, *or*
- use the Page Setup button  at the top to change the margins. **Note:** Changing the paper size and orientation from here does not affect the layout of the report. It was already formatted using the settings in your template.
- change the background color 
- add a watermark 

You can hover your mouse over the buttons to see what each does.

3. *How do I print the report?*

To print the report, from the Quick Report Preview window, choose one of the print buttons on the button bar:

- Print: Brings up your Windows printer software to allow you to choose which printer to send the report to.
- Print Direct: Sends the report directly to the default printer for your computer as defined by your operating system under Printers and Faxes.

Note: Printing does not save the Quick Report results. See the next section for information on saving the Quick Report for future access.

D. Saving a Quick Report

1. *What formats are available to save a Quick Report?*

A Quick Report can be saved in several different formats:

PDF
HTML
Text (txt)
CSV
MHT
Excel (xls)
Rich Text (RTF)
Graphic

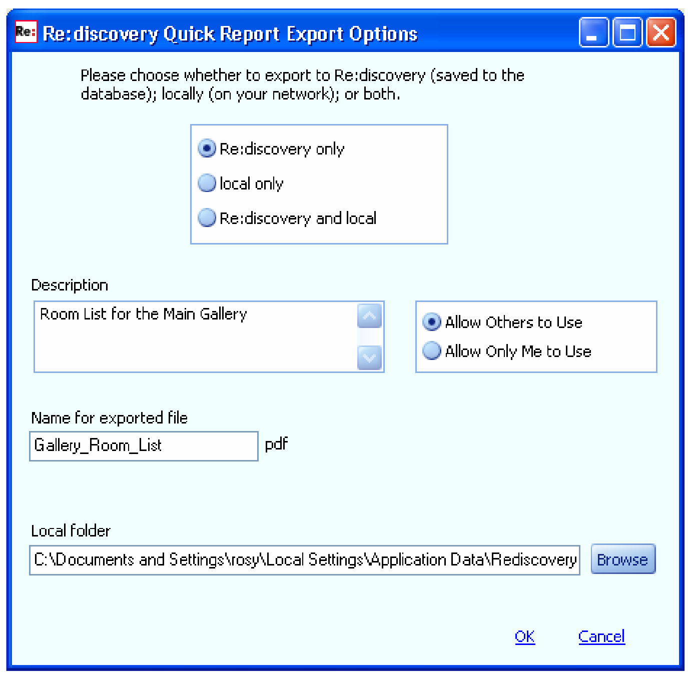
Note: If you include the institute's image or default images for records on the report, they will display in a PDF, HTML or graphic document only. These are the only file formats that can support images.

2. *How do I export and save the Quick Report?*

To save or export the Quick Report to another file format:

- First, run the Quick Report using a Quick Report template, as described in Section C above.

- On the Quick Report Preview window, click the down arrow next to the Export Document button  to choose a file format. A Quick Report Export Options window will open.



- Choose whether to save the file internally, externally or both.

  Re:discovery only: This saves the report internally. Reports saved internally will be accessible from the Quick Report Management window by selecting Results along the left edge.

Local only: This allows you to save the report outside of Re:discovery as a file on your computer. Reports saved outside of Re:discovery will not be accessible from the Quick Report Management window.

Re:discovery and Local: This saves the report internally and as a file outside of Re:discovery on your computer.

- Enter a description of the report (required).
- Choose whether to allow others to view and print the report or only you.
- Enter a name for the report file (required).
- If saving the file locally, enter a location in the Local folder box, or click Browse to select a location to save the file. By default, it will select a Rediscovery folder under your user name in the Documents and Settings folder on your C:\ drive.
- Click OK to save the report.

3. *How do I email the Quick Report?*

To send the report to someone as an attachment to an email:

- First, run the Quick Report using a Quick Report template, as described in Section C above.
- On the Quick Report Preview window, click the down arrow next to the Send email button  to choose a file format. The file formats are the same as exporting with the exception of the HTML format. Only PDF and Graphic document formats will display an image.
- Enter a name and location for the file.
- Your email software will open with the document already attached to a new email ready for you to address and send.

4. *How do I access Quick Reports that have been saved internally?*

To access Quick Reports that are saved in Rediscovery (internally):

- In the Quick Reports Management window, select Results on the left edge of the window.
- Select the report from the list of reports.
- Click Open on the button bar. The report will open in the format in which it was exported.

Note: If the file format has no application associated with it on your computer, you will get a message when you try to open the file: No application is associated with the specified file for this operation. This means that your computer does not have the program installed to view the file in that format. For example, PDF file extensions must have a PDF reader such as Adobe Acrobat. XLS file extensions require Microsoft Excel to open.

5. *How do I delete a saved report?*

To delete a report that was saved in Rediscovery (internally):

- In the Quick Reports Management window, select Report Results on the left edge of the window.
- Select the report from the list of reports.
- Click Delete on the button bar. The report will be deleted from the list.

IV. FULL VIEW

A. Overview

1. *What is the Full View option?*

Full View lets you view all the information about a catalog record, including supplemental data and attached images. It is also available for associated module records.

2. *When would I use Full View?*

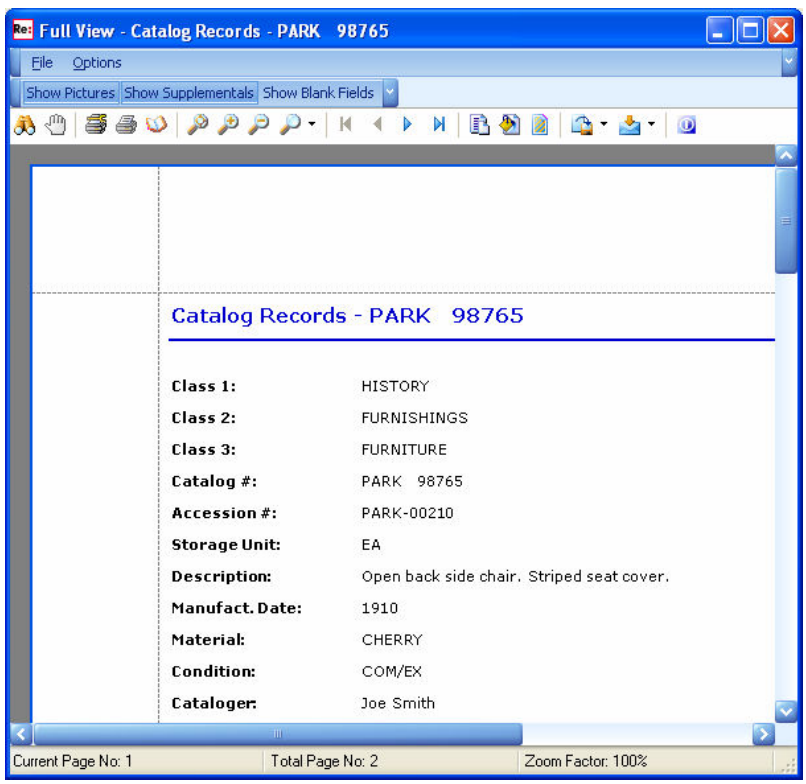
Use Full View to:

- Display only fields with data.
- View several catalog records at one time to compare.
- Print a catalog record with all information including supplementals and images.
- Export the catalog information for a single record to a file to send to a researcher.

3. *How do I access Full View?*

To open a Full View window for a record:

- Select a record so that it is loaded into the Record Pane.
- Click the Full View button on the Button bar, or
- Choose Full View from the Record menu on the Menu bar.



B. Full View Options

1. *How do I include/exclude supplementals?*

To include supplemental records in the Full View window for a record, click the Show Supplementals button on the toolbar, or check Show Supplementals on the Options menu.

Click the Show Supplementals button again to remove the supplementals from the Full View window.

2. *How do I include/exclude images from Full View?*

To include images in the Full View window if any are attached to a record, click the Show Pictures button on the toolbar, or check Show Pictures on the Options menu.

Click the Show Pictures button again to remove the images from the Full View window.

3. *Can I show fields that have not been entered?*

Yes. You can show blank fields in the Full View window. Click the Show Blank Fields button on the toolbar, or check Show Blank Fields on the Options menu. By default, only fields that contain data are shown in Full View.

Click the Show Blank Fields button again to remove the blank fields from the Full View window.

4. *What other options are available in the Full View window?*

Using the button bar, you can also:

- search the document for specific text
- modify the appearance of the document
- zoom and un-zoom the view of the document
- view subsequent pages of the document
- view multiple pages in the same window

Note: When you hover your mouse over a button on the Button bar, it will display its function.

5. *Can I change the order of the fields in Full View?*

No. You cannot change the order in which the fields display in Full View.

C. Printing Full View

1. *How do I print a Full View record?*

To print the Full View record:

- choose Print from the File menu, *or*
- click one of the print buttons on the button bar

Print ( ): Brings up your Windows printer software to allow you to choose which printer to send the report to.

Print Direct ( ): Sends the report directly to the default printer for your computer as defined by your operating system.

2. *Can I change the margins of the page?*

Yes. You can change the page margins by clicking the dotted lines on the Full View page and moving them in or out as desired.

3. *What other print options are available?*

Using the button bar, you can also:

- change the background appearance
- insert a watermark for the document

4. *Can I print more than one record at a time?*

No. You cannot print more than one record at a time from Full View. Only the visible record will print.

D. Exporting Full View

1. *What formats are available to export a Full View record?*

There are several file formats available to export the Full View record:

PDF
HTML
Text (txt)
CSV
MHT
Excel (xls)
Rich Text Document (RTF)
Graphic Document

Note: Only PDF, HTML and Graphic Document formats will include the image(s) attached to a record.

2. *How do I export a Full View record?*

To export a Full View record:

- On the Full View window, click on the down arrow attached to the Export document button on the button bar.
- Select a file format.
- In the Save As window, select the Save in location to save the document, enter a file name and click Save.

3. *How do I email a Full View record?*

To send an email with the Full View record attached:

- On the Full View window, click the down arrow attached to the Send Email button on the button bar.
- Select a file format (**Note:** HTML document format is not available for sending an email.)
- Click the Send Email button.

Your email software will open with the Full View document already attached, ready for you to address and send.